TXCPA CPE

2020 NONPROFIT ORGANIZATIONS CONFERENCE

May 18-19, 2020

Westin Galleria Dallas

20% Discount Available DETAILS INSIDE.

2020 NONPROFIT ORGANIZATIONS CONFERENCE

NPOC01

MAY 18-19, 2020

Registration and Breakfast

7 a.m. both days

CPE Hours

16 hours

CPE HOURS ARE BASED ON ACTUAL ATTENDANCE

Handouts

Handouts will be available beginning May 13, 2020. On May 13, 2020, TXCPA will send an email that contains the link to the handout website.

Cancellation Fee

Cancellations received less than five business days prior to the conference start date are subject to a $50 cancellation fee. Substitutions will be allowed until the start time of the program at no charge by calling 800-428-0272 or 972-687-8500. NO SHOWS WILL FORFEIT THE ENTIRE REGISTRATION FEE. TXCPA policies can be found at www.TSCPA.org.

TXCPA Registered Sponsor # 260

Program Location

Westin Galleria Dallas
13340 Dallas Pkwy
Dallas, TX 75240
Phone: 972-934-9494

Hotel

ROOM RATE:

$219.00 single/double + applicable taxes

A limited number of rooms have been reserved at this rate and are booked on a first-come, first-served basis. When making reservations, please identify yourself as a Texas Society of Certified Public Accountants: Nonprofit Organizations Conference registrant. YOU ARE RESPONSIBLE FOR YOUR OWN RESERVATIONS AND CANCELLATIONS. Call 888-627-8457 to make a hotel reservation.

HOTEL CUT-OFF DATE:

May 1, 2020 or when block fills
Check-in Time: 3 p.m.
Check-out Time: 12 p.m.

HOTEL PARKING RATES AT TIME OF PRINT:

Complimentary on-site parking/Valet parking: $28 daily

Parking charges are not included as part of the conference fee and are subject to change.

2020 NONPROFIT ORGANIZATIONS CONFERENCE COMMITTEE

Julia Petty, CPA
Committee Chair
The Museum of Fine Arts Houston
Houston

Lucas LaChance, CPA
Committee Co-Chair
Lane Gorman Trubitt PLLC
Dallas

Kristy L. Clemons, CPA
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Jackie Coburn, CPA
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HighGround Advisors
Dallas

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Anice Asberry
Staff Liaison
TXCPA CPE Foundation, Inc.

DAY 1
MONDAY
MAY 18

8 a.m. - 9:15 a.m.

A View of the Surprisingly Stable Economic Landscape
Christian Ledoux, CFA/Director of Investments Research/CAPTRUST/San Antonio
The U.S. economy has experienced a long period of remarkable stability. Our speaker will illustrate some of the forces that have created that stability and explore potential puts and takes going forward.

9:15 a.m. - 10:30 a.m.

FASB Update
Jeffrey Mechanick, CPA/Assistant Director/FASB/Norwalk, CT
In this session, FASB's lead staff person for not-for-profits will take you through and answer questions on the latest developments in GAAP, as well as noteworthy projects in FASB's pipeline. We'll discuss FASB's overall agenda, ASUs issued since last year's conference, implementation matters on recent major standards (especially on grants and contracts, and leases), and the current projects on gifts-in-kind, reference rate reform (the transition away from LIBOR), balance sheet classification of debt, and goodwill and intangibles.

10:30 a.m. - 10:45 a.m. Break

10:45 a.m. - 12 p.m. (Concurrent Sessions)

Putting Non-Profit Investments to Work for the Mission
Margaret Black/Director/LH Capital Inc./Lyda Hill Philanthropies/Dallas
Catherine Burnett/CIO/Phillips Foundation/Greensboro, NC
Kyle Manley/Senior Client Strategist/BNY Mellon Wealth Management/Dallas
Session panelists will present the concept of aligning investments with a nonprofit's mission from first ensuring investments are not working against the mission to align an entire investment portfolio with the mission and options in between. A variety of impact investment examples will be provided.

The Tax Cuts and Jobs Act and Tax-Exempt Organizations
Preston Quesenberry/Managing Director/KPMG/Washington, DC
This session will review the latest guidance under the TCJA affecting tax-exempt organizations, discuss the top compliance challenges and issues in the wake of this guidance, and present possible solutions to these challenges.

Non-Profit 101
Lucas LaChance, CPA/Principal/Lane Gorman Trubitt/Dallas
Babita Sherchan, CPA/Principal/Lane Gorman Trubitt/Dallas
In this session, we'll cover nonprofit basics, including what non-profit means, issues faced by nonprofit organizations, unique accounting rules and other matters that are relevant for nonprofit organizations.

12:05 p.m. - 1:05 p.m.

Lunch break

1:10 p.m. - 2:25 p.m. (Concurrent Sessions)

Are You Sufficiently Insured?
Chris McBee/Senior Vice President, Financial Services Practice Leader/Lockton Companies/Dallas
Ben K. Morgan/Senior Advisor/Lockton Companies/Dallas
As a result of many years of rate and premium reductions, a significant increase in securities claims activity, and the daily onslaught of material breach events, organizations are seeing the first significant hardening of markets in nearly 20 years. Is this the new normal for the insurance marketplace? Find out what is driving cost up in the directors and officers marketplace, what your organization can do to prevent a cyber breach from occurring and how to mitigate the damage in the event of a breach.

Texas State Tax and Regulatory Compliance for Nonprofits: Legal Perspective
Danika H. Mendrygal/Attorney/Mendrygal Law PLLC/Dallas
Genevra M. Williams/Attorney/Mendrygal Law PLLC/Dallas
This session will provide an overview of, and the legal perspective on, compliance issues related to Texas state tax compliance, including exemptions from sales tax, franchise/margin tax and property tax. Your speakers will also briefly address other miscellaneous legal compliance issues that regularly arise for clients located in Texas.

Grant Compliance - Avoiding Common Pitfalls
Neely D. Duncan, CPA, CFE/Partner/BKD/Dallas
Emily George, CPA/Senior Managing Consultant/BKD, LLP/Dallas
Grant compliance is essential in protecting your organization and maintaining funding. Join Neely Duncan and Emily George as they discuss the common pitfalls inherent with grant compliance aimed at helping you stay in compliance and protect your reputation.

2:30 p.m. - 3:30 p.m. (Concurrent Sessions)

Budgeting and Forecasting, What You Need to Know
Emily George, CPA/Senior Managing Consultant/BKD, LLP/Dallas
With complex accounting requirements, spending policies and funding restrictions, budgeting and forecasting for a nonprofit is challenging. Sharpen your skills by learning best practices regarding how to build, compile and implement a sustainable budget and forecast for future cash flows that will help keep your organization thriving for decades.

Charitable Solicitation - State Registration
Greg Lam/Attorney/Copilevitz, Lam & Raney, P.C./Kansas City, MO
This session will cover the multi-state regulation of charitable appeals. Given the increase in corporate philanthropy and online giving, state regulation of charitable fundraising has become more pervasive and complex. We will explore the regulatory structure and how charities and their professional service providers can navigate compliance.

Peer Review Update
Jeff Graham, CPA, CFE, CBA/Partner/Condley and Company, LLP/Abilene
The session will cover the changes in the peer review process and direction, common deficiencies noted in the nonprofit industry, preparing for peer review and considerations to improve the quality control system.

3:30 p.m. - 3:45 p.m. Break

3:45 p.m.- 5 p.m. (Concurrent Sessions)

Social Media That Kills
Lucas LaChance, CPA/Principal/Lane Gorman Trubitt/Dallas
Learn how your organization and employee image on social media platforms like LinkedIn can kill your business or kill the competition. You'll learn about brand image and properly communicating your company message. The presentation will provide a starting point and minimal guidelines on what social media restrictions and education you can offer your employees, as well as an overview of the life saving measures of a social platform crisis communication plan.

U-B-I-T ... What It Means for You and Me!
Michelle Weber, CPA/Partner/Grant Thornton NFP Tax Practice/Milwaukee
In this session, we'll discuss the updates to UBIT post TCJA (tax reform). We'll explore how to identify a UBIT activity, best practices on tracking the relevant info for compliance, and real-life implications of reporting UBIT post tax reform. Case studies will be used to dive into the impact of tax reform on exempt organization reporting of UBIT, including direct UBIT and alternative investment reporting.

Single Audit Hot Topics
Celina Cereceres, CPA/Public Sector Partner/Whitley Penn LLP/Houston
The Office of Management and Budget has made sweeping changes that affect auditees and auditors alike. We'll discuss the critical changes that have an impact on single audits and steps auditees can take to ensure compliance with their grant requirements.

DAY 2
TUESDAY
MAY 19

8 a.m. - 9:15 a.m.

Employee Fraud: Moving From Prevention to Detection

Steve Dawson, CPA, CFE/Dawson Forensic Group/President/Lubbock

With all prevention efforts in place, employee fraud can still happen. Whether because of small staff size or circumvention of control processes, no anti-fraud program is foolproof. Because of this fact, the focus shifts from prevention to detection. The earlier that detection occurs, the greater the chance of minimizing an organization's fraud loss. This session focuses on the detection processes that are relatively simple and cost-effective to implement that enhance the probabilities of quick detection of employee fraud.

9:20 a.m. - 10:35 a.m. (Concurrent Sessions)

Endowment Management: Key Decision Points and the Formula for Success

Kellie Morrison, CFA/Senior Director of Client Investment Solutions/HighGround Advisors/Dallas

The investment objectives for endowment management are unique, but the formula for success is relatively simple. This session explores the key decision points that contribute to the simple formula of an endowment's long-term success. Interestingly, decisions made can vary significantly by an organization's individual circumstances and objectives, resulting in many paths to achieving long-term success.

990 Common Mistakes

Pamela Alexanderson, CPA/Director/Moss Adams LLP/Albuquerque

Tracy Paglia, CPA/Partner/Moss Adams LLP/Stockton, CA

The IRS Form 990 is a valuable information gathering tool for the IRS to confirm organizations are meeting their nonprofit requirements. It's also important to donors and rating agencies in assessing and reporting the health of organizations. The objective of this session is to lay a foundation of understanding of the Form 990 and associated schedules, including how they intersect to form a complete return. We'll discuss common mistakes that can increase your organization's audit risk and best practices to consider in return presentation.

Special Events

Marion Armstrong/Associate General Counsel/HighGround Advisors/Dallas

Brandon Booker, CPA/Director of Financial Operations/American Heart Association/Dallas

Stephen King, CPA, CGMA/President and CEO/GrowthForce/Kingwood

Fundraising and donor development are critical pieces of an organization's operations. However, fundraising opportunities such as special events and donor initiatives come with unique challenges inherent in working with the multi-faceted teams leading such opportunities. Learn as our three panelists share their perspectives on challenges and best practices for collaboration from an accounting, development and legal perspective.

10:35 a.m. - 10:50 a.m. Break

10:50 a.m. - 11:50 a.m. (Concurrent Sessions)

How to Become an Inclusive Leader: Your Role in Creating a Culture of Belonging

MiShon Landry, CDP/CEO/Culture Consultants/Dallas

It is believed that over 80% of people who worked with an Inclusive + Equitable™ Leader were more engaged, productive, motivated, loyal to the organization, and willing to go the extra mile. Inclusive + Equitable™ Leaders understand that for collaboration to be successful, individuals must be willing to share their diverse perspectives and experiences. Most importantly, Inclusive + Equitable™ Leaders recognize that cultural competency must be present for innovation and equitable outcomes to be achieved. In this session, you'll examine the business case and gain an understanding of what critical traits, actions and behaviors contribute to Inclusive + Equitable™ Leadership, thereby creating a welcoming and inclusive environment, as well as explore Executive Board recruitment best practices.

Tax and Legal Issues of Complex Gifts

Jonathan Blum/Shareholder/Polsinelli PC/Dallas

Charities frequently have the opportunity to receive donations of complicated assets, but few understand how to deal with the complexity and potential consequences of receiving them. This session will review some of the tax and legal issues inherent in the receipt of complex gifts, and provide practical guidance and risk management techniques.

Best Practices for Internal Controls of Nonprofit Organizations

Kimberly DeWoody, CPA/Audit Partner/Whitley Penn LLP/Fort Worth

Properly implemented internal controls are essential to all nonprofit organizations, large or small. This session will cover common pitfalls and best practices that can be implemented for your organization.

12:10 p.m. - 1:10 p.m.

Lunch **break**

1:15 p.m. - 2:30 p.m. (Concurrent Sessions)

HR Horror Stories

Wendi Lehr/Owner/Human Resource Solutions LLC/Dallas

Lisa Locke/Partner/Human Resource Solutions LLC/Dallas

In this session, we'll tackle different, real-life human resource situations that can create issues for organizations and how to handle them. We'll focus on steps businesses can take to maintain compliance with the variety of federal, state and local laws.

Defining and Dealing With the Unique Aspects of Religious Organizations

Elaine Sommerville, CPA/Shareholder/Sommerville & Associates, P.C./Arlington

While there are many unique aspects to nonprofit organizations, religious organizations create a special sector in the nonprofit community. Exploring some unique differences in federal tax law and federal labor law, this session will examine the special aspects of religious organizations that set them apart from other nonprofit organizations.

Implementing ASU 2018-08 - Accounting for Grants and Contracts in Not-for-Profit Organizations

Pete Ugo, CPA/Partner/Crowe LLP/Indianapolis

This session will consist of a deep dive into ASU 2018-08. It will provide a detailed walkthrough of categorizing grants/contacts as either exchange transactions (contracts with customers under 606) or contributions (non-exchange transactions), as well as then determining when a contribution transaction is conditional or unconditional. The session will also include several examples and implementation guidance for organizations to prepare for and manage the impacts to their financial statements.

2:30 p.m. - 2:45 p.m. Break

2:45 p.m. - 4 p.m.

Technology Update

Bryan L. Wilton, CPA, CITP, MCP/Vice President/LBMC Technology Solutions, LLC/Brentwood, TN

You'll hear about current technology in the market today and what is coming in the next few years. Personal productivity tools are discussed as work and life blends for most people now.

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NPOC01

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Program Fees CHECK ONE

☐ $385 Early Bird TXCPA Member
☐ $560 Early Bird Nonmember
☐ $435 Standard TXCPA Member
☐ $610 Standard Nonmember

TXCPA EARLY BIRD DISCOUNT

Register by May 4, 2020, to receive early bird registration rates. TXCPA is not responsible for checks or registrations delayed or lost in the mail.

20% DISCOUNT

The first TXCPA member registrant from a firm or company at full price, all other TXCPA members from the firm or company at $308 early bird/$348 standard fee. To qualify for the discounts, registrations must be submitted together via phone or fax. Government registrations are excluded from this discount.

Four Ways to Register

ONLINE

Register at www.TSCPA.org

MAIL

Mail your registration form with check to:
TXCPA CPE Foundation, Inc.
14651 Dallas Parkway, Suite 700
Dallas, TX 75254

Make checks payable to
TXCPA CPE Foundation, Inc.

FAX

Fax registration form with credit card information to 972-687-8696 or 800-207-0273

PHONE

Phone your registration information in to 972-687-8500 or 800-428-0272

Registration Form for Mail or Fax

Member #:

Name:

Company/Firm:

Business Address:

City:

State: Zip:

Phone #:

Email Address:

☐ I have special needs under the Americans with Disabilities Act and/or food restrictions. Please list:

Payment Information

☐ Check payable to "TXCPA CPE Foundation, Inc." is enclosed

☐ Visa ☐ Mastercard ☐ Discover ☐ Amex

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Additional conference and cancellation policy information is located on the TXCPA website www.TSCPA.org

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