

Advising Nonprofit Organizations

Whether your client is a nonprofit or you are involved with nonprofits on a personal basis, this seminar will hit the highlights of organizing and operating a nonprofit organization, including:

- ◆ Organization setup and governance
- ◆ Financial oversight and accountability
- ◆ Investment and spending
- ◆ When the IRS and Oregon DOJ come calling

Thursday, September 24, 2009
9 a.m.–4:30 p.m.

Oregon Convention Center
Portland, Oregon

5.5 General CLE credits and 1 Ethics credit



Advising Nonprofit Organizations

Video Replays

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Oregon Convention Center
777 N.E. Martin Luther King Jr. Blvd.
Portland, Oregon

NONPROFITS RANGE FROM NATIONAL OPERATIONS WITH paid staff members and marketing budgets to all-volunteer grass-roots operations funded by bake sales. But organizing and operating a nonprofit requires more than good intentions.

The faculty for this information-packed seminar is highly experienced in a number of areas crucial to operating a nonprofit organization. They will guide you from the beginnings of a nonprofit—setup and governance—through more detailed operational aspects, such as financial oversight and accountability and IRS Form 990. Managing institutional funds will be examined, as well as what to do if the nonprofit receives an inquiry from the IRS or Oregon Department of Justice. You will also receive valuable legal ethics advice about identifying the client, conflicts of interest, and board membership.

Regardless of whether the nonprofit you are involved with is a client or your personal favorite that you volunteer for, as an attorney you will receive questions—and this seminar will provide the answers.

Register online at www.osbarcle.org, by using this form, or by calling the OSB CLE Service Center at (503) 431-6413, toll-free in Oregon at 1-800-452-8260, ext. 413. For a full listing of OSB CLE seminars, please visit www.osbarcle.org.

This seminar will be videotaped and shown in its entirety at the following locations if three or more registrations are received at least a week prior to the replay date. To find out if a replay will be shown, please click on the Seminars Calendar at www.osbarcle.org and select the date of the scheduled video replay.

- ◆ **Astoria**
Friday, October 16
Di Bartolomeo Law Office
1139 Exchange St.
- ◆ **Bend**
Friday, October 9
Miller Nash LLP
1567 S.W. Chandler Ave.
Suite 204
- ◆ **Coos Bay**
Friday, October 9
Daniel M. Hinrichs PC
590 Commercial Ave.
- ◆ **Eugene**
Friday, October 16
Gaydos Churnside & Balthrop PC
440 E. Broadway, Suite 300
- ◆ **Grants Pass**
Thursday, October 8
Josephine County Courthouse
Room 222
N.W. 6th and “C” Streets
- ◆ **Hood River**
Friday, October 9
Wyers Haskell Davies PC
216 Columbia
- ◆ **Klamath Falls**
Friday, October 9
Boivin Uerlings & DiLaconi PC
803 Main St., Suite 201
- ◆ **LaGrande**
Friday, October 9
Mautz Baum & O’Hanlon LLP
1902 Fourth St.
- ◆ **Medford**
Friday, October 16
Frohnmayr Deatherage
2592 E. Barnett Rd.
- ◆ **Newport**
Friday, October 16
Macpherson Gintner & Diaz
423 North Coast Highway
- ◆ **Pendleton**
Friday, October 16
Mautz Baum & O’Hanlon LLP
101 S.E. Byers Ave.
- ◆ **Redmond**
Friday, October 16
Bryant Emerson & Fitch
888 W. Evergreen
- ◆ **Roseburg**
Thursday, October 8
Douglas County Counsel’s Office
Law Library, Room 319
1036 S.E. Douglas
- ◆ **Salem**
Friday, October 9
The Vandermay Law Firm
New address:
2085 Commercial Street NE
- ◆ **Tigard**
Wednesday, October 7
Oregon State Bar Center
16037 S.W. Upper Boones Ferry Rd.
- ◆ **Vale**
Friday, October 9
Butler & Looney PC
292 Main St. S.

Advising Nonprofit Organizations—Thursday, September 24, 2009

8:00 Registration

9:00 **Setting up a New Nonprofit Corporation**

- ◆ Pros and cons of nonprofit status
- ◆ Choice of entity and IRS classification
- ◆ Articles of incorporation and bylaws
- ◆ Training the board of directors

David E. Atkin, *Nonprofit Support Services, Eugene*

9:45 **Tax Exempt Status**

- ◆ Who needs to apply
- ◆ Determining your type
- ◆ Client relations: tips for efficiency
- ◆ Hot spots on Form 1023

Penny H. Serrurier, *Stoel Rives LLP, Portland*

10:30 Break

10:45 **Rising Expectations for Nonprofit Governance**

- ◆ Pressures for better governance
- ◆ Directors' duties, liabilities, and protection
- ◆ New roles for lawyers

Cynthia Cumfer, *Community Development Law Center, Portland*

11:45 **Financial Oversight and Accountability**

- ◆ Essential financial information for effective oversight
- ◆ Key controls against fraud and abuse
- ◆ Restricted gifts and government awards

Kay Sohl, *Kay Sohl Consulting, Portland*

12:15 Lunch (On your own)

1:15 **Ethics Issues for Attorneys Working with Nonprofits**

- ◆ Board membership and its consequences
- ◆ Client identification and the acrimonious board
- ◆ Conflicts of interest

Bradley F. Tellam, *Stoel Rives LLP, Portland*

2:15 **The New IRS Form 990—What Attorneys Need to Know**

- ◆ Why attorneys care about an accounting form
- ◆ Policies highlighted in the new Form 990
- ◆ Hidden questions about the policies

Cynthia Cumfer, *Community Development Law Center, Portland*

2:45 **Investment and Spending in the Nonprofit World**

- ◆ Uniform Management of Institutional Funds Act (UMIFA) vs. Uniform Prudent Management of Institutional Funds Act (UPMIFA)
- ◆ Underwater endowment spending
- ◆ Releasing and modifying fund restrictions

Shouka D. Rezvani, *Tonkon Torp LLP, Portland*

3:15 Break

3:30 **Doing Good Abroad While Staying out of Trouble at Home**

- ◆ IRS regulations for organizations conducting foreign activities
- ◆ IRS regulations for organizations making foreign grants
- ◆ Best practice guidelines for organizations operating abroad
- ◆ Anti-terrorism best practice guidelines

David E. Atkin, *Nonprofit Support Services, Eugene*

4:00 **Nonprofits in Trouble—IRS and DOJ Inquiries**

- ◆ How organizations are selected and contacted
- ◆ Types of contact
- ◆ Oregon's public records law
- ◆ Attorney/client privilege

William S. Manne, *Miller Nash LLP, Portland*

4:30 Adjourn

Program Planners:

- ◆ David E. Atkin, *Nonprofit Support Services, Eugene*
- ◆ Cynthia Cumfer, *Community Development Law Center, Portland*

OSB CLE Seminars Attorney:

- ◆ Karen D. Lee, *kleee@osbar.org, (503) 431-6382*

SEMINAR REGISTRATION

PORTLAND

- \$175 OSB Member—Early registration
(received before noon, Monday, 9/21/09)..... \$ _____
- \$195 OSB Member—Regular registration
(received after noon, Monday, 9/21/09) \$ _____
- \$205 Non-OSB Member \$ _____
- \$0 **2009–2010 Season Ticket** (Please register
by noon, Monday, 9/21/09, to guarantee a
seat and course materials. Season Ticket
registrations received after this time are
welcome and will be accommodated on a
space-available basis.)..... \$ _____
- \$0 50-year OSB members may attend free of
charge \$ _____
- \$0 Oregon judges and their lawyer staff (see
below) \$ _____
 - Registrant is a judge
 - Registrant is a lawyer staff member for
the following judge

Judge (please print)

Signature of Judge (required)

TOTAL REGISTRATION FEES (NP09) (722) \$ _____
WB

VIDEO REPLAY

(Please see video replay schedule on previous page.)

Location: _____

- \$175 Registration \$ _____
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the following judge

Judge (please print)

Signature of Judge (required)

TOTAL REGISTRATION FEES (NP09) (722) \$ _____
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SEMINAR PRODUCT ORDERS

Seminar products will be available approximately two weeks after the live program.

- \$195 Audio CDs and course materials
(NP09.KCD) \$ _____
 - \$325 DVDs and course materials (NP09.KDV) \$ _____
 - \$65 Course materials (NP09.HB) \$ _____
- 2009–2010 Season Ticket No. _____
discount—subtract 20%: –
- Subtotal:..... \$ _____
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For audiocassette and VHS formats, please call the CLE Service Center at 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413.

DVD RENTALS

For additional viewers, please call 503-431-6351, or toll-free in Oregon at 1-800-452-8260, ext. 351.

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DVD rental discount—subtract 30%:..... –
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QUESTIONS? Call the CLE Service Center at 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413. For information about upcoming seminars, please visit the CLE Calendar at www.osbarcle.org.

CANCELLATIONS: Cancellation requests must be received at least 48 hours prior to the start of the seminar to qualify for a refund. Requests are accepted via phone, fax, or mail; please see “Four Ways to Register” for contact information. All cancellations are subject to a \$20 cancellation fee.

TUITION ASSISTANCE: Tuition assistance is available on the basis of financial need. Fax a request stating your financial situation to 503-968-4456 no later than one week before the seminar.

DIETARY RESTRICTIONS OR SPECIAL ACCOMMODATIONS: Call 503-431-6351, or toll-free in Oregon, 1-800-452-8260, ext. 351.

Bar # Name

Firm Name

Email Phone Fax

Address

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Registrations and orders will not be processed without payment.

1. **ONLINE** at www.osbarcle.org.
2. **PHONE:** 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413
3. **FAX with VISA or MasterCard number:** 503-968-4456
4. **MAIL with check:** Oregon State Bar, CLE Registration, P.O. Box 231935, Tigard, OR 97281-1935