

Putting Together the Pieces

for the

Not-for-Profit Industry

Executive Briefing with Interactive Q&A Panel



FOCUS ON: Risk Exposure and Key HR, Compensation, Tax, Legal & Regulatory Issues Impacting Your Organization, Board, Staff & Volunteers

Tuesday, May 17, 2016

7:45 – 10:15 a.m.

Maggiano's Old Orchard

4999 Old Orchard Ctr - Ste A28 - Skokie, IL

Please join W&D clients, friends and industry experts for a timely discussion of current questions and challenges facing not-for-profits, associations, foundations, board members and donors.

In a targeted, content-rich briefing and interactive panel session, we'll hit some of the major topics facing not-for-profit organizations today, including HR trends and risk exposure, compensation and disclosures, tax considerations, legal and regulatory updates, advice, best practices and more.

Together, we hope to help you put together the pieces to lead your organization to greater Board, staff and volunteer efficacy while minimizing risks.

Who Should Attend:

- Executive Directors
- Chief Financial Officers/Controllers
- Board Members
- Staff Members

COST IS COMPLIMENTARY – 2 HOURS CPE CREDIT

RESERVE YOUR SEAT TODAY

JOANNA POCIECHA

WARADY & DAVIS LLP

(847) 267-9600

JPOCIECHA@WARADYDAVIS.COM

AGENDA

7:45 – 8:15 a.m. Breakfast and Networking

8:15 – 8:25 a.m. Welcome, Opening Remarks and Introductions
Sue Greggo, CPA, Partner, Director of Not-for-Profit Services
Warady & Davis LLP

8:25 – 9:10 a.m. Executive Briefing

What's Your Risk? What actions should you take to protect your organization, management and Board Members from HR compliance exposure? If you are not protected, who is liable? Also discussed will be how your not-for-profit develops, manages and retains employees.

Presented by: Brandon Heitman, HR Consultant, Paychex

Legal and Regulatory Developments Impacting Your Not-for-Profit

There are a myriad of laws and regulations coming out of Washington and at the state level that may significantly impact your organization in 2016 and beyond including DOL guidance on independent contractors, how proposed DOL overtime rules could hike employee costs and more.

Presented by: Kathryn Vanden Berk, of Counsel - Bea & VandenBerk and Managing Attorney - Highland Park - Highwood Legal Aid Clinic

Executive Compensation, 1099s and other Tax Challenges

How to manage and prepare for IRS requirements and avoid potential filing penalties and audit exposure.

Presented by: David Faje, CPA, MST, Tax Manager, Not-for-Profit Services, Warady & Davis LLP

9:10 – 9:25 a.m. Table Collaboration on Topics

Share what is working at your organization, identify common question areas and ways to help each other.

9:25 – 10:10 a.m. Interactive Panel Question & Answer Session

10:10 a.m. Open Discussion and Adjourn

