

## Current Issues in Advising Tax-Exempt Organizations

- 8:00 - 8:30 am Registration & Continental Breakfast
- 8:30 - 9:30 am **Setting Up a New Nonprofit Corporation & Maintaining Tax-Exempt Status**  
– Leigh McKee, Foster Ockerman, Jr., David Spenard
- 9:30 - 10:30 am **Increasing Expectations for Nonprofit Governance** – Lisa Bentley,  
Leigh McKee, Foster Ockerman, Jr.
- 10:30 - 10:45 am Morning Break
- 10:45 - 11:45 am **Financial Oversight & Accountability**  
– Elizabeth Woodward
- 11:45am - 12:30 pm Lunch
- 12:30 - 1:30 pm **Ethical Issues for Working with Nonprofits**  
– Danielle Clore, Jane Graham, Leigh McKee,  
Foster Ockerman, Jr.
- 1:30 - 2:30 pm **Current Issues Facing the Nonprofit Sector I**  
– Anne Nash, David Spenard
- Charitable Gift Planning Update
  - UMIFA, UPMIFA and Kentucky
- 2:30 – 2:45 pm Afternoon Break
- 2:45 - 3:45 pm **Current Issues Facing the Nonprofit Sector II**  
– Jaelyn Badeau, Leigh McKee, Foster Ockerman, Jr.
- Executive Compensation & Retirement Planning Changes
  - Challenges to Tax-Exemption
- 3:45 – 4:00pm **Questions & Answers with Speakers**  
– Danielle Clore, Leigh McKee, Anne Nash,  
Foster Ockerman, Jr., David Spenard

## REGISTRATION FORM

### Current Issues in Advising Tax-Exempt Organizations

Wednesday, February 24, 2010 - Lexington, Kentucky

**Register online at [www.kynonprofits.org](http://www.kynonprofits.org)!**

- Please register me for the workshop. Enclosed is my payment of \$255.

(Please complete a separate form for each participant.)

Name \_\_\_\_\_ Title \_\_\_\_\_

Firm/Organization Name \_\_\_\_\_

E-mail Address \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_

State/Zip \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

Method of Payment:

- Check enclosed, payable to University of Kentucky
- Charge to Credit Card: \_\_\_ Visa \_\_\_ M/C Signature \_\_\_\_\_
- Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

## REGISTRATION INFORMATION

- Registration fee includes attendance for all sessions, applicable materials for sessions attended, continental breakfast, lunch and refreshments.
- Pre-registration is required by **February 22, 2010**.  
**Register online at [www.kynonprofits.org](http://www.kynonprofits.org)**, fax to (859) 323-2715 or mail to UK NLI, 300 Garrigus Building, Lexington, KY 40546.
- Full tuition refunds are given (less a \$100 administrative charge) with cancellations up to 72 business hours before program. Registration transfers may be made any time prior to seminar.

## FEATURED PRESENTERS

**Jane Graham, JD:** Founding Member & General Counsel, Women's Network—Advocates for Democratic Principles, Lexington

**Leigh McKee, CPA:** Shareholder, Dean Dorton Ford, PSC, Lexington

**Anne Nash, JD:** Principal and Owner, My Giving Advisor, LLC, Lexington

**Foster Ockerman, Jr., JD:** General Counsel, Resources in Healthcare Management LLC, Lexington

**David Spenard, JD:** Assistant Attorney General, KY Attorney General's Office of Rate Intervention, Frankfort

**Elizabeth Woodward, CPA:** Director of Forensic Accounting & Litigation Support, Dean Dorton Ford, PSC, Lexington



UNIVERSITY OF KENTUCKY  
Nonprofit Leadership Initiative

presents

**Current Issues in  
Advising Tax-  
Exempt Organizations**

*A seminar for Attorneys, CPAs,  
Advisors and Seasoned Nonprofit Leaders*

Wednesday, February 24, 2010

*Embassy Suites Hotel, Lexington*

6 hours CLE credit, including 1 hour of ethics  
(Kentucky Bar Association, pending approval)

6 hours CPE credit



UNIVERSITY OF KENTUCKY  
Nonprofit Leadership Initiative

300 Garrigus Building  
Lexington, KY 40546-0245  
Phone: (859) 257-2542  
Fax: (859) 323-2715

Nonprofit Org.  
U.S. Postage Paid  
Permit #51  
Lexington, KY

**Don't Forget!**

Register by:

**February 22, 2010**

Online at [www.kynonprofits.org](http://www.kynonprofits.org)

By Fax: (859) 323-2715

Or by mail to the address above