With more than 22,000 nonprofit organizations calling Oregon home, attorneys who advise them need to be well-versed on a wide variety of nonprofit issues. This advanced level seminar is a great resource if you have a practice that touches the nonprofit world. Explore nonprofit fraud trends and prevention, and learn how to handle audit response letters using ABA guidelines. Take a look at the latest legislative changes and case law. Understand how SRI and ESG factors can impact a charity’s investment strategy. Discuss ethical considerations when representing nonprofits. Examine the framework for utilizing a fiscal sponsor, and hear one attorney’s experience with crowdfunding and nonprofits. You will also receive an overview of nonprofit mergers, including alternatives.

Register by 9/14/15 and save $20.
Nonprofit Organizations Law Section members save $20 off registration rates.

Questions or need help with registration? Call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413, for assistance.
Agenda

7:30 Registration
8:30 Nonprofit Fraud: Trends, Investigation and Prevention
   • Legal, practical, and law enforcement perspectives on fraud and embezzlement in the charitable world
   Detective Elizabeth Cruthers, Portland Police Bureau, White Collar Crime Unit, Portland
   Kris Kalanges, CPA, Financial Investigator, ODJ, Charitable Activities Section, Portland
   Douglas Pearson, CFE, Chief Investigator, ODJ, Charitable Activities Section, Portland
   Detective Brian Sitton, Portland Police Bureau, White Collar Crime Unit, Portland

9:30 Audit Response Letters
   • Utilizing the ABA guidelines
   • Obtaining client consent and approval of response
   • Protecting attorney-client privilege and work product
   • Determining materiality to financial statements
   Jane Hanawalt, Law Offices of Jane C. Hanawalt, Florence

10:00 Break
10:15 Legislative/Caselaw Update
   Michele Wasson, Stoel Rives LLP, Portland

11:00 From SRI to ESG: Using Environmental Social and Governance Factors as Part of a Charity’s Investment Strategy
   • Developments in socially responsive investing (SRI)
   • Duty of loyalty and mission-related investing
   • The evolution of the prudent investor standard
   Professor Susan Gary, University of Oregon School of Law, Eugene

11:45 Nonprofit Organizations Law Section Annual Meeting
   Susan Bower, Chair, NOL Section
   Thank you to the Nonprofit Organizations Law Section for generously sponsoring lunch.

Noon Lunch
   (Box lunch included with registration. Please make your selection when registering.)

12:45 Current Ethical Issues in Representing Nonprofits
   • Boards in conflict
   • Representing multiple related entities
   • Ethical boundaries when serving on multiple boards
   Helen Hierschbiel, Oregon State Bar, Tigard

1:45 Fiscal Sponsorships
   • When to use a fiscal sponsor
   • Common types of fiscal sponsor relationships
   • Fiscal sponsor duties
   • Writing a Fiscal Sponsor Agreement (FSA)
   David Atkin, Center for Nonprofit Law, Eugene

2:45 Break
3:00 Crowdfunding and Nonprofits: One Practitioner’s Experience
   • Crowdfunding: How is it done?
   • Legal pitfalls
   • Board responsibilities
   • Potential for fraud
   Earl Christison IV, Novation Law, Keizer

3:30 Mergers
   • Overview of the merger process
   • Steps of a merger
   • Alternatives
   Cynthia Cumfer, Attorney at Law, Portland

4:30 Adjourn

Planning Committee
David Atkin, Center for Nonprofit Law, Eugene
Richard Barowsay, Tomasi Salyer Barowsay, Portland
Nancy Chafin, Chafin Law Firm, Portland
Jane Hanawalt, Law Offices of Jane C. Hanawalt, Florence
Nancy Murray, Attorney at Law, Portland

Products
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