



The 2009 Washington Non-Profit Legal & Tax Conference® Program

March 5-6, 2009
J.W. Marriott Hotel
Washington, D.C.
[printable version](#)

2010 program to be posted Summer 2009

Wednesday Evening, March 4

5:00-6:30 PM	Early Registration	Grand Registration Area
6:30-8:00 PM	Introduction to the IRS Reporting Forms for EOs	Salon D Edward D. Coleman Nancy Murphy

Thursday, March 5

8:00 AM	Continental Breakfast	Grand Foyer
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Morning Session

Moderator: Edward D. Coleman

9:00 AM	Current Developments Affecting Exempt Organizations	Bruce R. Hopkins
9:50 AM	Time to Batten Down the Hatches? IRS Audit Plans For 2009 And How To Defend	Marcus S. Owens
10:35 AM	<i>Questions & Answers</i>	
10:50 AM	Charitable Giving Tax Pitfalls: Avoiding; Climbing Out; Cyanide Capsule?	Conrad Teitell
11:40 AM	Governance Issues: Impact of the Revised Form 990	Suzanne Ross McDowell

12:30 PM Luncheon
Speaker: Lois Lerner
Update from the IRS

Salons I & II

Afternoon Breakout Session I: UBIT & IRS Reporting

Moderator: Joseph E. Lundy

2:00-5:30 PM

2:00 PM	UBIT: Understanding the Rules and Current Issues	Joseph E. Lundy
2:45 PM	UBIT: Case Studies	David M. Repass
3:30 PM	<i>Questions & Answers</i>	
3:45 PM	Non-Profit Reporting to the IRS & Related Issues	D. Greg Goller
5:00 PM	<i>Questions & Answers</i>	

Salon III

Afternoon Breakout Session II: Private Foundations and Religious Organizations; Donor Advised Funds and Supporting Organizations

Moderator: Charles M. Watkins

2:00-5:30 PM

2:00 PM	Current Issues Affecting Private Foundations	Victoria B. Bjorklund
3:00 PM	Recent Developments Affecting Churches and Religious Organizations	Deirdre Dessingue
3:30 PM	<i>Questions & Answers</i>	
3:45 PM	Donor Advised Funds and Type III Supporting Organizations	David M. Repass
5:15 PM	<i>Questions & Answers</i>	

Afternoon Breakout Session III: Deferred Compensation; Planned Giving

Salon G

Moderator: Wendell R. Bird
Moderator: Edward D. Coleman
2:00-5:30 PM

2:00 PM	Developments in Deferred Compensation For Exempt Organizations (Section 403(b))	Robert J. Architect
2:45 PM	Developments in Deferred Compensation For Exempt Organizations (Section 457)	Cheryl E. Press
3:30 PM	<i>Questions & Answers</i>	
3:45 PM	Charitable Gift Annuities and Many Other Charitable Split-Interests Not in Trust	Laura H. Peebles Elisa S. Rizzo
5:15 PM	<i>Questions & Answers</i>	

Thursday Evening, March 5

5:45-7:00 PM **Registrant's Reception** **Garden Terrace**
(Sponsored by Webster, Chamberlain & Bean)

Friday, March 6

7:30 AM **Continental Breakfast** **Grand Foyer**

Morning Session

Moderator: Edward D. Coleman

8:30 AM	Update from Capitol Hill	Gordon Clay Karen McAfee Theresa Pattara Tiffany Smith
9:20 AM	An Understanding Of Section 527 and Current Issues	Alan P. Dye Judith E. Kindell
10:05 AM	Questions & Answers	

Morning Breakout Session I: Charitable Fundraising

Moderator: David P. Goch

10:20 AM-12:00 PM

10:20 AM	Legal Issues In Charitable Fundraising	David P. Goch Charles M. Watkins
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Morning Breakout Session II: Non-Profit Accounting Developments

Moderator: Edward D. Coleman

10:20 AM-12:00 PM

10:20 AM	Ethics Tune-Up for the Non-Profit's Accountant	Jack Marshall
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Morning Breakout Session III: Non-Profits and Health Care

Moderator: Michael I. Sanders

10:20 AM-12:00 PM

10:20 AM	Partnerships and Joint Ventures	Michael I. Sanders
11:05 AM	Health Care Tax Update	Thomas K. Hyatt
11:50 AM	<i>Questions & Answers</i>	

12:00 PM **Luncheon**

Speaker: Joseph M. Brodecki
What is Going On In the Capital Markets?

Salons I & II

Afternoon Breakout Session I

1:30-3:30 PM

1:30 PM	Non-Profit Accounting Developments	Richard F. Larkin
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Afternoon Breakout Session II

Moderator: Hugh K. Webster

1:30-3:30 PM

1:30 PM	Recent Developments Impacting Associations	Hugh K. Webster James S. Wilson, Jr.
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Afternoon Breakout Session III: Legal Ethics

1:30-3:30 PM

Salon IV

1:30 PM

The Saint's Excuse, and Other Ethics Challenges For Non-Profit Counsel

Jack Marshall

Current Tax Issues Affecting Colleges and Universities

Moderator: Bertrand M. Harding, Jr.

1:30-3:30 PM

Salon F

Evening Session: (Repeat of Wednesday Evening Session)

4:00-5:30 PM

4:00 PM

Introduction to the IRS Reporting Forms for EOs

Salon G

Edward D. Coleman
Nancy Murphy