



Previous Conference Programs

2005 2006 2007 2008

The 2006 Washington Non-Profit Legal & Tax Conference® Program

March 2-3, 2006
J.W. Marriott Hotel
Washington, D.C.

Wednesday Evening, March 1

5:00-6:30 PM Early Registration
6:30-8:00 PM Filing the Revised Form 1023 Application and an Open Forum

Registration Area
Edward D. Coleman
Jay H. Rotz
Charles M. Watkins

Thursday, March 2

8:00 AM Continental Breakfast

Capitol Foyer

Morning Session

Moderator: Edward D. Coleman

9:00 AM Current Developments Affecting Exempt Organizations
9:50 AM Is It Safe To Go Outside?--- IRS Audit Plans For Tax-Exempt Organizations
10:35 AM *Questions & Answers - Intermission - Refreshment Break*
10:50 AM Charitable Giving Pitfalls: Avoiding; Climbing Out; Cyanide Capsule?
11:40 AM Recent Developments Affecting Charitable Giving

Salons D, E & F

Bruce R. Hopkins
Marcus S. Owens

12:00 PM Luncheon
Speaker: Hon. Rick Santorum (invited)

Conrad Teitell
Suzanne Ross
McDowell

Salons I & II

Afternoon Session I: UBIT & IRS Reporting

Moderator: Joseph E. Lundy

2:00-5:30 PM

2:00 PM UBIT: Understanding the Rules and Current Issues
2:45 PM UBIT: Case Studies

3:30 PM *Questions & Answers - Intermission - Refreshment Break*
3:45 PM Non-Profit Reporting to the IRS & Related Issues
5:00 PM *Questions and Answers*

Salon D

Joseph E. Lundy
David M. Repass
Virginia Richardson

Harvey J. Berger

Afternoon Session II: Intermediate Sanctions; Charitable Fundraising

Moderator: Jay H. Rotz

2:00-5:30 PM

2:00 PM Latest Developments In Intermediate Sanctions including Case Studies
3:00 PM Instrumentalities & Tax Status
3:30 PM *Questions & Answers - Intermission - Refreshment Break*
3:45 PM State Charitable Solicitation Registration Requirements
4:30 PM State Law Regulation of Charitable Fundraising
5:15 PM *Question & Answer Session*

Salon E

David L. Fish
Jay H. Rotz

David P. Goch
Karl E. Emerson

Afternoon Session III: Deferred Compensation; Planned Giving

Moderator: Alan P. Dye

2:00-5:30 PM

2:00 PM Developments in Deferred Compensation For Exempt Organizations (Section 403(b))
2:45 PM Developments in Deferred Compensation For Exempt Organizations (Section 457)
3:30 PM *Questions & Answers - Intermission - Refreshment Break*
3:45 PM Planned Giving in a Complex World

Salon F

Robert J. Architect
Cheryl E. Press

Jerry J. McCoy

Thursday Evening, March 2

**5:45-7:00 PM Registrants' Reception
(Sponsored by Webster, Chamberlain & Bean)**

**Garden Terrace
(Lobby Level)**

Friday, March 3

7:30 AM Continental Breakfast

Capitol Foyer

Morning Session

Moderator: Edward D. Coleman

Salons D, E & F

8:30 AM Update From the IRS

Marvin Friedlander

9:20 AM Tax Relief Act of 2006 and Senate Finance Committee Staff Proposals: Brave New World for Charities & Foundations

Wendell R. Bird

10:05 AM *Questions & Answers - Intermission - Refreshment Break*

Morning Breakout Session I: Private Foundations and Religious Organizations

Moderator: Jay H. Rotz

Salon D

10:20 AM-12:00 PM

10:20 AM Current Issues Affecting Private Foundations

Victoria B. Bjorklund

11:05 AM Significant Tax and Other Developments Affecting Churches and Religious Organizations

Deirdre Dessingue

11:50 AM *Question & Answer Session*

Morning Breakout Session II: Non-Profit Accounting Developments

Moderator: Edward D. Coleman

Salon E

10:20 AM-12:00 PM

10:20 AM Non-Profit Accounting & Auditing Developments

Richard F. Larkin

Morning Breakout Session III: Panel Discussion with Association Executives

Moderator: Arthur L. Herold

Salon F

10:20 AM-12:00 PM

10:20 AM Association Executives Discuss Non-Profit Issues

Kevin M. Burke
James A. Kaitz
Don I. Tharpe

**12:00 PM Luncheon: A Look Behind the Headlines; Strategies In Today's Markets
Speaker: Joseph M. Brodecki**

Salons I & II

Afternoon Session I: Legal Ethics

1:30-3:30 PM

Salon D

1:30 PM A Matter of Trust: Legal Ethics & Governance for Non-Profit Legal Counsel

Micahel G.
Daigneault

Afternoon Session II: Non-Tax Issues

Moderator: Arthur L. Herold

Salon E

1:30-3:30 PM

1:30 PM Why Nonprofit Directors are Sued

Hugh K. Webster

2:30 PM Non-Profit Combinations: Mergers, Consolidations, and Takeovers

Arthur L. Herold
James S. Wilson, Jr.

Afternoon Session III: Non-Profits and Health Care

Moderator: Michael I. Sanders

Salon F

1:30-3:30 PM

1:30 PM Partnerships and Joint Ventures

Michael I. Sanders

2:30 PM Health Care Tax Update

Thomas K. Hyatt