

# Arizona Society of CPAs



## Not-for-Profit Conference

September 30, 2009

Black Canyon Conference Center – Phoenix





# Program

This conference is designed to provide specific, practical coverage of critical nonprofit accounting, tax, and legal issues, for CPAs, financial professionals and individuals working for and with nonprofit organizations.

## CONFERENCE AGENDA

7:30 – 8:00 On-Site Registration & Continental Breakfast

8:00 – 8:05 Welcome  
Brenda Blunt, CPA, Conference Chair

8:05 – 9:15 What is Collaboration and How Do Organizations Define It?  
Lois Savage

How is collaboration perceived by funders and key stakeholders of any organization? Collaboration has been discussed, debated and encouraged for years. This session will help define collaboration from the leading foundation in private funding and the designer and facilitator of a National Nonprofit Collaboration Award that was just completed this year. There will be examples of a variety of successful collaboration ventures.

9:15 – 9:30 Refreshment Break  
Sponsored by LarsonAllen, LLP

9:30 – 10:00 Arizona Stimulus Update  
Matthew Hanson

At last count, a little over \$5 billion dollars of stimulus money has made or is making its way to Arizona. What opportunities and threats does this infusion present to your organization, your clients and your family? Come and hear the latest on the impact the stimulus money has had and is expected to have, with a particular focus on the Arizona non-profit sector.

10:05 – 11:05 A. Essentials of Risk Management and Insurance Market Forecast  
Kevin Cummings

What you can expect in 2010 and how to avoid the land mines.

B. A&A Update  
Rob Leslie

This timely update is designed to help you understand the latest accounting and auditing developments affecting not-for-profits.

11:05 – 12:00 Luncheon  
Sponsored by Miller Allen & Co., P.C.

12:00 – 1:45 Don't Fear the 2008 Form 990 Filing Season!  
Eve Borenstein

The "redesign" of the Form 990 has wrought a complete sea-change for both filing organizations and preparers. Since the Form and its

instructions were published by the IRS last December, many practical points have been revealed. This session will focus on 'lessons learned' to date and address: practical challenges in data gathering; priorities amidst the nonfinancial schedules; what the IRS plans to do with the 990 filings/information and how best to communicate with internal stakeholders.

1:50 – 3:15 C. New 990 Hands-on Workshop  
Brenda Blunt

You have heard Eve Borenstein's update, attended seminars, read newsletters and heard overviews. Now get ready to roll up your sleeves and talk with your peers about some of the most difficult and perplexing questions from the trenches. Bring your questions or send them in advance to [bblunt@cbiz.com](mailto:bblunt@cbiz.com), subject: "990 Workshop" and we will explore the answers together.

D. Managing Personnel in These Difficult Times

Greg Coy and Kara Rosseaux

Are people furloughing their employees, job sharing, laying off, pay cuts, etc? What are organizations doing, given fewer financial resources, to run the organization and continue delivering programs?

3:15 – 3:30 Refreshment Break  
Sponsored by Sechler CPA, PC

3:30 – 4:30 Online New Media and Social Networking  
Aaron Stiner

This session will provide an overview of popular online new media and social networking tools, why you would want to use them and how (and how not) to use them on behalf of your organization.



## Thank You to Our Sponsors:

Lunch Sponsor—  
Miller, Allen & Co., P.C.

A.M. Break Sponsor—LarsonAllen, LLP

P.M. Break Sponsor—Sechler CPA, PC

Exhibitor—CBIZ and Mayer Hoffman  
McCann, PC

# Registration



## CONFERENCE PLANNING COMMITTEE

Brenda A. Blunt, CPA – Committee Chair  
CBIZ and Mayer Hoffman McCann, PC

Thomas K. Avery, CPA  
Catholic Community Foundation

Regina R. Caplan, CPA  
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LLC

## LOCATION:

Black Canyon Conference Center  
9440 North 25th Avenue  
Phoenix, AZ 85021  
(602) 944-0569

I-17 to Dunlap. Exit east on Dunlap and turn north (left) on 25th Avenue. Center is ¼ mile north of Dunlap on west (left) side of 25th Avenue. Facility is walking distance from the Courtyard by Marriott (Metrocenter). Center is approximately 25 minutes from the airport.

Recommended CPE Credit – 8 hours

## Arizona Society of CPAs Not-for-Profit Conference

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Black Canyon Conference Center - Phoenix  
Course Code — NPC

**ASCPA Member Fee: \$240 Nonmember Fee: \$315**

Name: \_\_\_\_\_

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 Staff  Nonmember  
 Conference Committee Member

Special Services: Description: \_\_\_\_\_

### Breakout Sessions:

10:05 – 11:05 a.m.

1:50 – 3:15 p.m.

A. Risk Management

C. 990 Workshop

B. A&A Update

D. Managing Personnel

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### To Register by Check:

Check Enclosed — Make check payable and mail to:

**Arizona Society of CPAs  
4801 E. Washington St., Ste. 225-B  
Phoenix, AZ 85034-2021**

The ASCPA will be processing checks submitted in payment as an Electronic Funds Transfer (EFT) transaction. Funds may be withdrawn from your account as soon as the same day we receive your payment. Note: All rules and policies of the Arizona Society of CPAs apply to this conference. Refer to the 2009-10 ASCPA CPE Resource Catalog for more details or call the ASCPA CPE Department at (602) 252-4144, ext. 213.

## Save Time — Register Online

[www.ascpa.com](http://www.ascpa.com)



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## Speakers

**Brenda A. Blunt, CPA**, is a director with CBIZ Accounting, Tax & Advisory Services, LLC and a shareholder with Mayer Hoffman McCann P.C. She has more than 20 years of income tax, accounting and audit experience ranging from working for one of the Big Four firms to working as a sole practitioner. Blunt works on a variety of tax planning, IRS controversy and compliance matters.

**Eve Rose Borenstein** is a partner in Borenstein and McVeigh Law Office (BAMlaw) in Minneapolis and also operates her own teaching and speaking company, Eve Rose Borenstein, LLC. She works with diverse nonprofit organizations on tax planning and compliance. Borenstein has been engaged in providing feedback to the IRS on its exempt organization tax form reporting, participating in both the Form 1023 revision and the 2007-08 redesign of the Form 990.

**Greg Coy, CPA**, recently started his own accounting, internal audit and consulting practice, Gregory M. Coy, CPA after more than 18 years serving the nonprofit community. He was formerly the vice president of Internal Audit and Compliance at Arizona State University Foundation. Coy is teaching at the AICPA Not-for-Profit Financial Executive Forum.

**Kevin Patrick Cummings** is executive vice president and partner of Willis. He is an associate in risk management and a certified insurance counselor. His career in commercial insurance started when he moved to the southwest to work for Lovitt Touche, Inc. in 1993. Cummings has been on the exceptional producers' council since 1997 and is an active member on several community boards.

**Matthew Hanson, GPC**, is the assistant director of programs and performance for the Governor's Office of Economic Recovery. He helps coordinate the implementation of more than six billion dollars worth of federal grants allocated to the State of Arizona from the American Recovery and Reinvestment Act of 2009. Previously,

Hanson served as the intergovernmental and grants program coordinator for the City of Goodyear and was director of the Grants Policy Office at the U.S. Department of Justice's Office.

**Rob Leslie, CPA**, is a senior vice president and director of the non-profit services division of Mutual of Omaha Bank. He directs the delivery of all banking services to the nonprofit community. Prior to joining the Bank, he directed the nonprofit services division of a national CPA firm. His duties included oversight of financial statements audits, general business consulting and compliance reporting of nonprofit organizations.

**Lois Savage** spent many years as a real estate attorney and community volunteer before embarking on a second career in philanthropy. Since its inception in 1999, Savage has served as president of The Lodestar Foundation. In addition, she served as executive director of Social Venture Partners Arizona (a venture philanthropy organization initiated by Lodestar).

**Kara Rosseaux, SPHR, M.A.**, is currently the director of human resources for Jones, Skelton & Hochuli, P.L.C. Previously, she spent 15 years in training/development, operations and human resources in the nonprofit sector. She is board president for Bridging Arizona, a furniture bank supporting families coming out of transitional living situations and is on the Leadership Advisory Council for the Wellness Community.

**Aaron Stiner, MNpS**, joined the ASU Lodestar Center for Philanthropy and Nonprofit Innovation as the program manager of Advancing Philanthropy the beginning of this year. He had six years experience at Valley of the Sun United Way as a campaigner, project director and gift officer managing relationships with 250 major-gift donors.