



## Previous Conference Programs

2005 2006 2007 2008

### The 2005 Washington Non-Profit Legal & Tax Conference® Program

March 2-3, 2005

Capital Hilton  
Washington, D.C.

#### Wednesday Evening, March 2

6:30-8:00 PM Non-Profits and Gaming: General Questions

Federal A/B  
Edward D. Coleman  
Jay H. Rotz

#### Thursday, March 3

8:00 AM Full Breakfast

Congressional/Senate  
Bruce R. Hopkins

8:45 AM Current Developments Affecting Exempt Organizations

#### Morning Session

Moderator: Edward D. Coleman

10:00 AM-12:35 PM

10:00 AM Publicly Supported Charities, Private Foundations and Everything In Between: Talking--  
And Understanding--the Talk

Conrad Teitell

10:45 AM Standing Toe-To-Toe With the IRS

Marcus S. Owens

11:30 AM Questions & Answers - Intermission - Refreshment Break

11:45 AM Corporate Governance for Nonprofits: Emerging Best Practices

Suzanne Ross McDowell

12:35 PM Luncheon

Congressional/Senate

#### Afternoon Session I: UBIT & IRS Reporting

Moderator: Joseph E. Lundy

2:00-5:30 PM

2:00 PM Drugs, Sex and UBIT- Discussion Topics with Grandchildren

Joseph E. Lundy

2:45 PM UBIT Case Studies

John F. Reilly  
Virginia Richardson

3:30 PM Questions & Answers - Intermission - Refreshment Break

3:45 PM Non-Profit Reporting to the IRS & Related Issues

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

Lawrence M. Brauer

2:45 PM Intermediate Sanctions: Case Studies

Jay H. Rotz

3:30 PM Questions & Answers-Intermission-Refreshment Break

3:45 PM State Charitable Solicitation Registration Requirements

David P. Goch

4:30 PM State Law Regulation of Charitable Fundraising

Karl E. Emerson

5:15 PM Question & Answer Session

#### 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)]

Statler AB  
Robert J. Architect

2:45 PM Developments in Deferred Compensation for Exempt Organizations (Section 457)  
3:30 PM *Questions & Answers-Intermission- Refreshment Break*  
3:45 PM Funding Split-Interest Charitable Trusts with Difficult Assets  
  
5:15 PM *Question & Answer Session*

Cheryl E. Press

Daniel L. Daniels  
David T. Leibell

**Special Open Forum Session**  
**4:35-5:30 PM**

4:35 PM Questions for the IRS Experts

**Federal A/B**

William L. Brockner  
John F. Reilly  
Virginia Richardson

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**Thursday Evening, March 3**

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

**Twigs Grill (Lobby Level)**

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**Friday, March 4**

**7:30 AM Continental Breakfast**

**Presidential Ballroom**

**Morning Session**

**Moderator: Edward D. Coleman**  
**8:30-10:20 AM**

**Presidential Ballroom**

8:30 AM Update From the IRS  
9:20 AM Charitable Giving: The Donations Most Charities Dont Know They Should Want, and Most Advisors Dont Know How To Give  
10:05 AM *Questions & Answers-Intermission-Refreshment Break*

Marvin Friedlander  
Wendell R. Bird

**Morning Breakout Session I: Private Foundations and Religious Organizations**

**Moderator: Jay H. Rotz**  
**10:20 AM-12:00 PM**

**Senate**

10:20 AM Current Issues Affecting Private Foundations  
11:05 AM Recent Developments Affecting Churches and Religious Organizations  
11:50 AM *Questions & Answers Session*

Victoria B. Bjorklund  
Deirdre Dessingue  
Charles M. Watkins

**Morning Breakout Session II: Non-Profit Accounting Developments**

**Moderator: Edward D. Coleman**  
**10:20 AM-12:00 PM**

**Congressional**

10:20 AM Non-Profit Accounting Developments

Richard J. Locastro

**Morning Breakout Session III: Intellectual Property and Non-Profits**

**Moderator: John W. Hazard, Jr.**  
**10:20 AM-12:00 PM**

**South American AB**

10:20 AM Basic Trademark Principles  
11:10 AM Copyright Law from the Basics to Cyberspace

David M. Abrahams  
John W. Hazard, Jr.

**12:00 PM Luncheon**  
**Speaker: Dean Zerbe**

**Federal AB**

**Afternoon Session I: Legal Ethics**

**1:30-3:30 PM**

**Congressional**

1:30 PM Ethical Considerations When Representing Non-Profits and Tax-Exempt Organizations

Shane T. Hamilton  
Mark A. Srere

**Afternoon Session II: Non-Tax Issues**

**Moderator: Hugh K. Webster**  
**1:30-3:30 PM**

**South American AB**

1:30 PM Non-Profit Compensation: Early Lessons from the Grasso and Ovitz Litigation  
2:30 PM Developments Affecting Associations

Hugh K. Webster  
James L. Clarke

**Afternoon Session III: Non-Profits and Health Care**

**Senate**

**Moderator: Michael I. Sanders**

**1:30-3:30 PM**

1:30 PM Partnerships and Joint Ventures

2:30 PM Health Care Update

Michael I. Sanders

Thomas K. Hyatt

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