

Montgomery,  
McCracken, Walker  
& Rhoads, LLP  
&  
*Nonprofit Issues*®

Present

18th Annual  
*This Year in  
Nonprofit Law*

Thursday, November 20, 2008  
9:00 a.m. to 3:45 p.m.

Montgomery, McCracken  
Walker & Rhoads, LLP  
123 South Broad Street  
28th Floor  
Philadelphia, PA

*This Year in Nonprofit Law*

Montgomery, McCracken, Walker & Rhoads, LLP, in conjunction with *Nonprofit Issues*®, will present its 18th Annual “This Year in Nonprofit Law” on Thursday, November 20, 2008. This Year’s program will combine:

- Review of the major developments in nonprofit law during the last year in Congress and the Courts.
- Tips on “Meeting the Needs of Major Donors” from three persons who deal with the issues every day.
- Review of the proposed new Form 990 tax information return from the point of view of a donor and a regulator.
- The Top 10 Errors of Nonprofit Governance learned in the Standards for Excellence Program of the Pennsylvania Association of Nonprofit Organizations.
- Updates on important issues in charitable giving, employment law and employee benefits.
- Session on ethical issues for nonprofit lawyers.
- Networking with your colleagues.
- Notebook of articles and citations.
- Continuing education credit for Pennsylvania lawyers and accountants.

A **FREE** one year subscription (or renewal) to *Nonprofit Issues*®.

*Featured Speakers*

Donald W. Kramer  
Virginia P. Sikes  
Catherine H. Gillespie  
Karl E. Emerson  
Gregory G. Fox  
William L. Kingsbury  
Richard W. Hartmann  
Joyce Link  
Clifford Scott Meyer

Samuel Caldwell  
*President, The Planned Giving  
Company*  
Eileen Heisman  
*President, National Philanthropic Trust*  
Andrew Swinney,  
*President, The Philadelphia Foundation*

Tish Mogan  
*Pennsylvania Association of Nonprofit  
Organizations*

Register on-line at  
[www.nonprofitissues.com/  
conference.html](http://www.nonprofitissues.com/conference.html)

*Nonprofit Issues*®  
P.O. Box 482  
Dresher, PA 19025  
1.888.NP.Issue

# PROGRAM

8:30 a.m. **REGISTRATION**

9:00 a.m. **WELCOME**

Donald W. Kramer  
Chair, Nonprofit Law Group  
Editor, *Nonprofit Issues*®

9:15 a.m. **"THIS YEAR IN NONPROFIT LAW"**

10:45 a.m. **BREAK**

11:00 a.m. **MEETING THE NEEDS OF  
MAJOR DONORS**

12:15 p.m. **LUNCH**

1:00 p.m. **CONCURRENT SESSIONS**

- A. The New Form 990
- B. Charitable Giving
- C. Employment Law

2:15 p.m. **BREAK**

2:30 p.m. **CONCURRENT SESSIONS**

- A. Top 10 Errors of Nonprofit Governance
- B. Employee Benefit Law
- C. Ethical Issues for Nonprofit Lawyers

3:45 p.m. **ADJOURNMENT**

*Nonprofit Issues*® and the Philadelphia law firm of Montgomery, McCracken, Walker & Rhoads will present the 18<sup>th</sup> annual "This Year in Nonprofit Law" on Thursday, November 20, 2008.

Our panel of lawyers who deal with nonprofit legal issues every day will review the most important legal developments for nonprofits during the last year.

In the second session, Samuel Caldwell, President of the Planned Giving Company, Eileen Heisman, President of the National Philanthropic Trust, and Andrew Swinney, President of The Philadelphia Foundation, will share their insights on "Meeting the Needs of Major Donors."

The first round of afternoon break-out sessions will include review of the new Form 990 tax information return from the point of view of a donor and a regulator, some advanced issues in charitable giving and an employment law session covering religion in the workplace and electronic document policies.

The second round will cover the upcoming deadlines for 403(b) and nonqualified plan filings, the top 10 errors of nonprofit governance suggested by the Standards for Excellence program of PANO, and a discussion of ethical issues for nonprofit lawyers.

The program provides 5 hours of continuing education credit for Pennsylvania lawyers, including an hour of ethics credit for those attending the ethics session, and 5 hours of CPE for Pennsylvania accountants.

Participants will receive a new or renewed one-year subscription to *Nonprofit Issues*®, plus a notebook of articles, outlines and other materials. The program starts at 9 a.m. and runs until 3:45. The registration fee is \$145, but additional registrants from the same organization may attend for \$85. Lawyers requesting Pennsylvania CLE must pay an additional \$10 for processing. We will provide you with lunch and a notebook of back-up information and citations. Register now, space is limited.

## This Year in Nonprofit Law

Thursday, November 20, 2008

► Program location: Montgomery, McCracken  
123 South Broad Street, 28th Floor, Philadelphia, PA

- Yes, I will attend** \_\_\_\_\_ \$145  
 PA Continuing Legal Education Credits \$10

Please photocopy and complete a separate registration form for each additional attendee from the same organization. The cost for additional attendees is **\$85/person**.

- No, I am unable to attend, but add me to your mailing list

### WORKSHOP SESSIONS

I expect to attend the following workshop sessions

**1:00 p.m.**

- The New Form 990  
 Charitable Giving  
 Employment Law

**2:30 p.m.**

- Top 10 Errors of Nonprofit Governance  
 Employee Benefit Law  
 Ethical Issues for Nonprofit Lawyers

Name \_\_\_\_\_ Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ E-mail Address \_\_\_\_\_

### Method of Payment

- Check (Make checks payable to **Nonprofit Issues, Inc.**)  
 Visa  
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**Registration Deadline: November 18, 2008**  
Registrants who cancel after November 18, 2008 will receive program materials in lieu of a refund.

### 3 Ways to Register:

1. Mail to:  
Nonprofit Issues \* P.O. Box 482 \* Dresher, PA 19025
2. Send via fax: (215) 542-7548
3. Register on-line at  
[www.nonprofitissues.com/conference.html](http://www.nonprofitissues.com/conference.html)