

BAWL NATIONAL

NONPROFIT *Virtual* CONFERENCE

NOVEMBER 5, 2020

What's on your radar?®

NONPROFITCONFERENCE.COM

About the Conference

At the BMWL National Nonprofit Conference, you have the opportunity to be updated on legal, tax, financial, and accounting issues that affect your organization.



This year's speakers are at the forefront of developments affecting nonprofits and will address the topics nonprofit leaders need to know about right now, including trends in policy and recent cases, rulings, and other developments. Through one full day of focused learning led by industry experts, you will walk away with the ability to lead your organization more effectively, and you will be given practical ways to address recent developments in nonprofit legislation, regulation, and litigation.

At the BMWL National Nonprofit Conference, we will analyze:

- Changes to standards, laws, and regulations that affect your organization
- Employee benefit plan developments (including recent disaster relief provisions)
- Corporate structure trends and considerations
- Financial and operational lessons from COVID-19
- And more!

“As always, the BMWL conference does not disappoint. Every aspect of the conference from the content presented to the overall experience is top notch! Thank you for filtering through all of the happenings in the nonprofit world and focusing on the key items and drivers that will help me impact the ongoing concerns of my organization.”

**- Coby Allen, Director of Finance
Prestonwood Baptist Church, Plano, Texas**



**Join nonprofit leaders
from across the country**



**One of the top-ranked
conferences in the US by
leading nonprofit
publishing organization**



**Up to 7.5 CPE
credits available**

“Very glad I came. It is inspiring to get our organization operating at the highest level of accountability and governance.”

- Steve Lawhon, Executive Vice President
Peter & John Radio Fellowship, Baltimore, Maryland

“As a new client to BMW, we have been very impressed with them thus far. This conference was no different. From great topics and speakers to a great location, the whole event was extremely well done!”

- Jason Merryman, CFO
MAP International, Brunswick, Georgia

“Mike and his team have put on an excellent conference! From the knowledge and informative presentations of each expert to the quick-hit/topic-specific flow of the day, it clearly communicated and imparted what churches and nonprofits need to know in an accessible way...”

- Rob Toal, VP & Publisher
Church Law & Tax, Carol Stream, Illinois

“Outstanding! Learned practical tips and organizational changes I can implement immediately!”

- Stephanie Garris, CEO
Grace Medical Home, Orlando, Florida

“I attend several nonprofit conferences each year, and the BMW Conference is always the best!”

- Joe Williams, Assistant Controller & Director of Financial Planning and Analysis
Cru, Orlando, Florida

“Great conference. Very helpful, covering a wide variety of important topics. [I] appreciate all that BMW does to keep us informed on governmental and compliance standards and changes. BMW offers a panoply of resources to help us navigate challenging times.”

- Scott Stevens, Manager of Financial Analysis
Bible League International, Crete, Illinois

Presentation Topics & Schedule

Morning Sessions



FEDERAL AND STATE UPDATE

Mike Batts

- » The PPP loan program – where are we now?
- » Update on unrelated business income...including the new “silo” rules
- » Proposed changes to group exemption rules
- » Update on new rules on excess remuneration and parachute payments for nonprofit leaders
- » Business activities separate from exempt entities do not qualify for exemption
- » Yes...the IRS still revokes exemptions and pursues criminal charges for egregious abuses by church and other nonprofit leaders
- » Reminder about recent changes to private school racial nondiscrimination policy publicity
- » Change in tax rate for private foundations
- » Continuing proliferation of donor-advised funds – and possible new regulations
- » Remote working and state tax nexus – special considerations
- » A word about data security
- » And more!



IMPLICATIONS FOR NONPROFITS OF RECENT U.S. SUPREME COURT DECISIONS

- » Nationally prominent First Amendment legal counsel will describe the significance of recent major U.S. Supreme Court decisions for nonprofit organizations



DISASTER RELIEF AND EMPLOYEE RELIEF PROVISIONS IN FEDERAL TAX LAW

Michele Wales

- » An overview of relevant disaster relief and employee relief provisions in federal tax law



GIFTS FROM A NONPROFIT – Federal Tax Implications

Michele Wales

- » An overview of the federal tax implications when nonprofits make gifts to employees, board members, and others

Afternoon Sessions



EMPLOYEE BENEFIT PLAN DEVELOPMENTS

Danny Miller

- » An overview of recent developments in employee benefit plan law, rules, and other authoritative guidance that will include recent disaster relief provisions and proposed changes related to health sharing ministry arrangements

GAAP ACCOUNTING UPDATE

Mike Lee & Dale Houser

- » An update on recent changes to accounting and financial reporting rules affecting nonprofit organizations



LET'S GO OVER THIS AGAIN...Proper Documentation for Travel, Meals, and Hospitality...Why It Matters – TECH TIPS FOR DOCUMENTATION

Kaylyn Varnum & Danny Johnson

- » An explanation of why proper documentation for travel, meals, and hospitality expenses is so important for nonprofit leaders...and some tips on using technology to ease the administrative burden



CORPORATE STRUCTURE – An Update

Mike Batts

- » A description of trending and recent experiences in addressing corporate structure considerations from a risk management perspective



A FORECAST OF TAX POLICY DEVELOPMENTS OVER THE NEXT FOUR YEARS

Mike Batts

- » Mike Batts will prognosticate on likely legislative and regulatory developments over the next four years affecting nonprofits, given the results of the 2020 general election



NONCOMPLIANCE, COMPLIANCE, AND HYPERCOMPLIANCE – Doing the Right Thing the Right Way for the Right Reasons

Michael Martin

- » What does it mean to do the right thing when the right thing isn't obvious? This session will discuss the impact of disregarding the law (both at the micro and macro levels), "hypercompliance," and when violating a law may be the right thing to do



FINANCIAL AND OPERATIONAL LESSONS FROM COVID-19

- » Nonprofit leaders will discuss some major lessons they and their organizations have learned through the COVID-19 pandemic



Speakers



MIKE BATTS

Managing Partner, BMWL

Mike Batts is the managing partner of BMWL. Mike has more than 30 years of experience serving nonprofit organizations in a variety of ways. He has served on and chaired the boards of nonprofit organizations – both nationally and locally. Mike is a member and former chairman of the board of ECFA. He advises nonprofit organizations on matters related to board governance, financial oversight, tax compliance and strategy, risk management, corporate structure, international activities, and other related topics. Mike has authored several books and has actively engaged in nonprofit legislative matters at the federal and state levels.



MICHELE WALES

National Director – Tax Services, BMWL

Michele Wales is a partner and the national director of tax services for BMWL. She has supervisory responsibility for the firm's tax practice, with expertise in federal, state, and local tax issues affecting nonprofit organizations and their affiliates. Michele has more than 20 years of experience in public accounting, and has also served as chief financial officer for a large nonprofit social services agency and controller for an airplane manufacturing company. She has been a conference speaker on nonprofit taxation issues at both the national and local levels.



DANNY MILLER

Partner, Connor & Winters

G. Daniel (Danny) Miller is a partner based in the Washington, D.C. office of Conner & Winters, LLP, a Tulsa, Oklahoma based law firm, and is a member of that firm's Employee Benefits Practice Group. Danny graduated from Vanderbilt University in 1971 and received his law degree from the Vanderbilt University School of Law in 1974. Danny has been practicing in the employee benefits area since graduating from law school and has a national practice serving the deferred compensation planning needs of a variety of nonprofit employers, including a number of denominational benefit programs.



MIKE LEE

National Director – Audit & Assurance Services, BMWL

Mike Lee is a partner and the national director of audit and assurance services for BMWL. He has more than 20 years of experience in auditing for nonprofit organizations, analyzing internal controls, and other related areas of practice. Mike is a contributing editor of BMWL's nonprofit feature articles and special alerts, which provide news related to current developments and perspective on issues impacting nonprofits. Mike has been a conference speaker on nonprofit accounting and auditing issues at both the national and local levels.



DALE HOUSER

Partner – Audit & Assurance Services, BMWL

Dale Houser is a partner on the audit and assurance team for BMWL. As a partner, Dale manages and oversees multiple audits, including our largest and most complex client engagements. Dale's responsibilities include regularly communicating with our clients, both during the audit and at other times throughout the year; supervising team members assigned to client engagements; evaluating internal control and assisting clients in addressing internal control matters; drafting and reviewing audit reports; researching, analyzing, and reviewing complex technical accounting and auditing matters; reviewing audit documentation; and related responsibilities.



KAYLYN VARNUM

Assistant National Director – Tax Services, BMWL

Kaylyn Varnum is a partner and the assistant national director of tax services for BMWL. Kaylyn's primary responsibilities include performing research and analysis related to technical tax issues at the federal, state, and local levels; providing tax advisory services related to exempt organization corporate structure planning; obtaining and maintaining federal, state, and local tax exemptions; and evaluating exempt organizations' tax compliance. She is also a member of the Christianity Today Church Law & Tax 2020 Advisors-at-Large board. She has been a conference speaker on nonprofit taxation issues at both the national and local levels.

Speakers



DANNY JOHNSON

Partner – Audit & Assurance Services, BMWL

Danny Johnson is a partner on the audit and assurance team for BMWL. Danny manages and oversees multiple audits, including our largest and most complex client engagements. His responsibilities include regularly communicating with our clients; supervising team members assigned to client engagements; evaluating internal control matters; drafting and reviewing audit reports; researching, analyzing, and reviewing complex technical accounting and auditing matters; reviewing audit documentation; and related responsibilities.



MICHAEL MARTIN

President, ECFA

Michael Martin became ECFA's president in 2020. Both an attorney and a CPA, he had previously served on ECFA staff for nine years, most recently as Executive Vice President. Michael is passionate about helping churches and Christ-centered ministries maintain high standards of financial integrity through ECFA membership. An accomplished communicator, he is a frequent speaker on ECFA's webinars, videos, and podcasts, as well as a regular contributor to ECFA's library of ebooks and other written publications.

“I have a very busy schedule, but am so glad that I was able to attend my first BMWL nonprofit conference [in 2019]. So much helpful and timely information is packed into a one day event. I’ll be back every year. The BMWL team should be proud of executing such a first class event.”

- David Erne, Controller,
North American Veterinary Community (NAVC), Orlando, Florida



Registration & Tuition

Registration for the Conference is by invitation only. Staff members of nonprofit organizations who have not received an invitation may request one. Registration for invited attendees and requests for invitations may be found on our website, www.nonprofitconference.com.



Individual

\$395	\$495
early-bird rate*	regular rate

BMW Clients

\$145	\$245
early-bird rate*	regular rate

For audit clients with complimentary registrations, these rates are for any registrations in excess of the number of complimentary registrations offered.

BMW Audit Clients with Complimentary Registrations

No Charge

*Early-bird rate expires on September 30, 2020.

Conference Policies

Conference tuition is not refundable. However, if a conflict arises that prevents you from being able to attend the Conference after you have registered, your registration can be transferred to another employee in your organization or can be applied to tuition at a future Conference. For more information regarding cancellations, transfers, and/or other concerns, please call our office at 800.960.0803 or email info@nonprofitconference.com.

Virtual Format Information

LIVE

Broadcasting live from multiple locations, attendees will be provided with a full day of up-to-the-minute content.



How do I join?

Registered attendees will be provided with a private, unique link to use on the morning of the Conference, not requiring any software download.

INTERACTIVE

Our virtual Conference platform will allow for questions throughout the day.

COMPREHENSIVE DIGITAL BINDER

All attendees will receive digital copies of the Conference manual, complete with detailed outlines, illustrations, and related resources so you don't miss a beat.



Continuing Education

Learning Objectives – To obtain an understanding of recent legal, tax, financial, and accounting issues affecting nonprofit organizations

Prerequisites – Working knowledge of tax and accounting issues affecting nonprofit organizations. No advance preparation is required.

Delivery Method – Group Internet Based

Program Level – Update

Earn up to 7.5 hours of NASBA CPE credit (5.5 in Taxes, 1 in A&A, and 1 in Specialized Knowledge). Also qualifies for Florida CLE and The Church Network CEUs.

Batts Morrison Wales & Lee, P.A. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. We have registered with the Texas State Board of Public Accountancy as a CPE sponsor. This registration does not constitute an endorsement by the Board as to the quality of our CPE program.

CEU - The Church Network Credit: Batts Morrison Wales & Lee, P.A. is a National Registered Continuing Education Provider (NRCEP) with The Church Network. This program is a premier comprehensive continuing education program related to administration in the local church. It is designed to enhance the ongoing professional development of The Church Network members and other ministry professionals, through the offering of quality learning experiences. 0.1 CEUs will be granted to persons who properly register and attend one contact hour of a minimum of 50 minutes of lecture, presentation, or discussion on approved topics.



KEEPING WATCH FOR NONPROFITS ACROSS THE UNITED STATES®

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