

PREMIER SPONSOR

## Morgan Lewis

**Morgan, Lewis & Bockius LLP | [morganlewis.com/services/tax-exempt-organizations](https://morganlewis.com/services/tax-exempt-organizations)**

Since its founding in 1873, Morgan Lewis has represented philanthropists and the nonprofit organizations they create through every major development in the tax law. Our tax-exempt organizations team represents institutions of all kinds—corporate, family and institutional foundations, colleges and universities, hospitals, trade associations, religious organizations, governmental entities, cultural organizations, advocacy groups, and many others—in achieving their objectives.

THURSDAY NETWORKING RECEPTION SPONSOR



**Frost Wealth Advisors | [frostbank.com/pages/personal-investments.aspx](https://frostbank.com/pages/personal-investments.aspx)**

Frost is the banking, investments and insurance subsidiary of Cullen/Frost Bankers, Inc. (NYSE: CFR). One of the 50 largest U.S. banks by asset size, Frost provides a full range of banking, investments and insurance services to businesses and individuals in the Austin, Corpus Christi, Dallas, Fort Worth, Houston, Permian Basin, Rio Grande Valley and San Antonio regions. Founded in 1868, Frost has helped Texans with their financial needs during three centuries.

Frost has a team of professionals who work together towards a common goal: to help you achieve financial security. Today the Frost Wealth Advisors are responsible for more than more than \$64 billion in assets at September 30, 2024. of individuals, families, businesses and non-profit institutions. You can count on us for investment management, trust administration, estate and financial planning, real estate, oil and gas management, retirement plan management, tax planning and wealth management. Frost has built a legacy of involvement with the communities it serves, especially with the organizations that provide for the betterment of the community. In fact, we have a dedicated group of specialists in our Public Finance Division who understand the specialized financing, treasury, investment and insurance needs of Texas governmental and non-profit institutions including educational, religious and healthcare organizations.

**SPEAKERS' DINNER SPONSOR**



**Your Part-Time Controller, LLC | [yptc.com/](http://yptc.com/)**

Your Part-Time Controller, LLC (YPTC) is celebrating 30 years of serving nonprofits! What began in 1993 as a small enterprise by Founder and President Eric Faint has grown into a national firm of 600+ staff and 1700+ clients. YPTC does one thing and does it well—financial management for nonprofits. No matter the type, size, or location, YPTC offers valuable services to all clients, including accounting, financial reporting, data visualization, and more. Support, flexibility, and transformation mark our overall approach; we meet clients wherever they are. As a partner and strengthening agent, YPTC allows nonprofits to focus on what matters: furthering the mission of the organization. For more information, please visit our website [www.yptc.com](http://www.yptc.com).

**INSTITUTE SPONSORS**

# Arnold & Porter

**Arnold & Porter | [arnoldporter.com/en](http://arnoldporter.com/en)**

At Arnold & Porter, we are client-driven and industry-focused. With over 1,000 lawyers across 15 offices worldwide, we provide sophisticated regulatory, litigation, and transactional capabilities across multiple industries to nearly half of the Fortune 100, as well as many other clients.

Our Tax-Exempt Organizations team employs a comprehensive knowledge of market practices to develop innovative structures and vehicles that help clients maximize their charitable, policy, and social impact. Clients turn to us on issues involving collaborations and consortiums, complex multiparty transactions, corporate and venture philanthropy, governance, impact investing, intellectual property licensing, internal investigations, international affiliations, major gifts, and regulatory compliance, among many others. Leveraging our firm's full breadth of experience, we provide sector-based insights and advice tailored to each client's unique needs.



**Blazek & Vetterling | [bvcpa.com](http://bvcpa.com)**

Blazek & Vetterling brings together a collective specialization in nonprofit organizations that we believe is unique. With approximately 80 people working with over 700 tax-exempt organizations, we believe that we bring more focused experience to our nonprofit, governmental, and employee benefit plan clients than any other firm. We are a nationally recognized leader in the nonprofit arena, offering audit, tax, and consulting services to a wide range of organizations. In addition to providing professional accounting services to nonprofit organizations, we teach locally and nationally, write, and serve on boards of directors. Our philosophy of service is to understand the unique issues that nonprofit organizations face and to approach them in a professional, business-oriented manner.



**Bourland, Wall & Wenzel, P.C. | [bwwlaw.com](http://bwwlaw.com)**

Bourland, Wall & Wenzel, P.C. (“BWW”) has been providing high-quality legal services since its founding more than 40 years ago. Throughout that time period, representation of nonprofit organizations, including trade and professional associations, has been a key component of the firm’s practice. BWW is located in downtown Fort Worth, Texas. This location has allowed our firm to work on sophisticated legal projects in a “large city” environment while also giving us the unique ability to represent and work closely with entrepreneurs—both on their for-profit projects as well as in their nonprofit endeavors.

BWW has 29 lawyers spread over a number of different practice areas. We consider ourselves a full-service firm, with limited exceptions where we partner with others. As part of our practice areas, we have lawyers skilled in business planning (including general contract law and leasing and rental issues), tax planning, employment law, intellectual property law, litigation, and the law of tax-exempt organizations. While located in the Dallas/Fort Worth Metroplex, we have major clients all over the State of Texas and Southwestern United States (as well as clients that go beyond those primary boundaries). Our clients’ businesses, however, have a much greater reach, as they operate nationally and internationally, resulting in us working on projects well beyond the State of Texas. From the standpoint of exempt organizations, we represent very small local organizations, from booster clubs to library associations, to state-wide and regional charitable organizations, to national organizations and organizations that work internationally.



**Brown Advisory | [brownadvisory.com](http://brownadvisory.com)**

Brown Advisory is an independent investment management and strategic advisory firm committed to delivering a combination of first-class performance, strategic advice and the highest level of client service with offices in Austin, Baltimore, Boston, Delaware, Frankfurt, London, Nashville, New York, North Carolina, San Francisco, Singapore, Southern California, Tokyo, Virginia and Washington, D.C. The firm's institutional and private clients are based in 50 states and more than 44 countries and territories and are served by over 850 colleagues worldwide, all of whom are equity owners of the firm.



**Ernst & Young LLP | [ey.com](http://ey.com)**

Your business will only succeed if you build it on a strong foundation and grow it in a sustainable way. At EY, we believe that managing your tax obligations responsibly and proactively can make a critical difference. Our global teams of talented people bring you technical knowledge, business experience and consistency, all built on our unwavering commitment to quality service—wherever you are and whatever tax services you need.

We create highly networked teams that can advise on planning, compliance and reporting and help you maintain constructive tax authority relationships—wherever you operate. Our technical networks across the globe can work with you to reduce inefficiencies, mitigate risk and improve opportunity. Our 50,000 tax professionals, in more than 150 countries, are committed to giving you the quality, consistency and customization you need to support your tax function.



**Fizer, Beck, Webster, Bentley, & Scroggins, PC | [fizerbeck.com](http://fizerbeck.com)**

FizerBeck has a highly-regarded and extensive nonprofit and tax exempt organizations practice, in which we assist clients in creating private foundations and public charities, render tax advice on the operation of tax exempt organizations and plan all forms of present and deferred charitable gifts. In this area, we are frequently called upon to obtain private letter rulings from the IRS, and represent tax exempt organizations before the IRS. In this practice area, we advise directors and trustees as to their rights, powers and duties, and in general, work with nonprofit and tax exempt organizations in all phases of their operations and administrative compliance. Clients range from individuals seeking to establish their own charitable organization to established national charities seeking fundraising, fiduciary and/or other legal advice.

## Holland & Knight

**Holland & Knight LLP | [hklaw.com](http://hklaw.com)**

Holland & Knight has a deeply engrained culture of collaboration, client service, efficiency and diversity, as well as integration across multiple practice groups and industries. Few other law firms have our combination of experience, knowledge and capabilities with nonprofit organizations.

As active industry contributors and thought leaders, our Nonprofit and Tax-Exempt Group takes pride in keeping our clients abreast of significant legal and industry developments impacting nonprofits, often before they happen. We are committed to learning about our nonprofit clients' operations, objectives and challenges. This combined focus on both the big picture and client specifics helps us provide tailored guidance to enhance our clients' decision-making to achieve desired outcomes and results. With H&K as a strategic partner, nonprofits are able to focus on what they do best, furthering their mission.



**Morgan Stanley Graystone Consulting | [graystone.morganstanley.com/norman.e.nabhan](http://graystone.morganstanley.com/norman.e.nabhan)**

An independent business unit of Morgan Stanley, Graystone Consulting has more than 40 years of experience advising institutional clients as a fiduciary. Our boutique business structure, depth of experience and vast resources have helped us grow into one of the most respected investment consulting firms in the U.S. Whether you are looking to reduce expenses, enhance returns or align your mission with your investments, Graystone is your strategic partner. Our research on “Best of Class” 3rd party asset management firms is one of the broadest in the industry, designed to help nonprofits and foundations meet their investment goals. Graystone consults on over 800 Foundations & Endowment clients with a combined \$29B in AUM.



**Northern Trust | [northerntrust.com/FIA](http://northerntrust.com/FIA)**

Northern Trust Foundation & Institutional Advisors serves foundations, endowments and other institutional investors as a dedicated investment advisor or a fully outsourced chief investment officer. The practice is consultative and advice-driven, providing holistic solutions that combine sophisticated advisory expertise with a spectrum of value-added services.

**UNDERWRITER**



**Goldman Sachs Philanthropy Fund | [goldmansachs.com](http://goldmansachs.com)**