

# 2024 Nonprofit Organizations Fundamentals

## February 7, 2024 • Four Seasons Hotel • Austin, TX

### Wednesday Afternoon, Feb. 7, 2024

**Presiding Officer:**

**Andrea L. March**, Texas Rio Grande Legal Aid - Austin, TX

1:00 pm	<b>Registration Opens</b>  Includes light refreshments.
1:50 pm	<b>Welcoming Remarks</b>
2:00 pm 1.00 hr	<b>Setting Up a Nonprofit: State Law and Organizational Issues and Considerations</b>  Establishing a solid legal and tax foundation is essential for nonprofits. This presentation addresses how to prevent organizational building blocks from becoming missional roadblocks.  Harrison M. Smith, HMS Law - North Richland Hills, TX Elaine Sommerville, Sommerville & Associates, P.C. - Arlington, TX
3:00 pm 1.00 hr	<b>Applying for and Maintaining Tax-Exempt Status</b>  Hear what you need to know to become tax exempt and to stay that way.  Michaela J. Cromar, CliftonLarsonAllen LLP - Fort Worth, TX Katherine E. David, Steptoe & Johnson PLLC - San Antonio, Texas
4:00 pm	<b>15-Minute Break</b>
4:15 pm 1.00 hr	<b>The Form 990 Series</b>  This session covers the fundamentals of the Form 990, with an emphasis on the essential information that every director, officer, fundraiser, and staff member must understand. Hear how the Form 990 is simultaneously a public relations tool for potential donors and a compliance roadmap, both internally (for staff) and externally (for regulators).  Barbara Murphy, Blazek & Vetterling - Houston, TX Genevra Williams, Mendrygal Law, PLLC - Dallas, TX
5:15 pm 1.00 hr	<b>When Things Don't Work Out: Combining, Winding Down and Dissolution Issues</b>  This session discusses the legal and accounting implications that one should consider when a tax-exempt nonprofit corporation decides to merge with another non-profit, dissolve or undertake other formation changes. When a significant change in formation and/or structure occurs, public charities and private foundations will need to follow steps to execute the change in a legal, efficient, and beneficial manner, and this session discusses these steps so you and your organization are prepared should you decide to pursue a significant change in formation and/or structure.  Pam Alexanderson, Moss Adams - Albuquerque, NM Nykolos McKissic, Holland & Knight LLP - Dallas, TX

6:15 pm

**Adjourn to Networking Reception (6:15 p.m. - 7:15 p.m.)**

Join us for a networking opportunity with faculty and colleagues.

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