

8 Hours of CPE

THE NEBRASKA SOCIETY OF CPAs' 15TH ANNUAL NOT-FOR-PROFIT ORGANIZATIONS' CONFERENCE

Thursday, June 24, 2010

The Cornhusker Hotel, A Marriott Hotel
333 South 13th Street , Lincoln, Nebraska

A One-Day Conference designed specifically for accounting professionals of Not-For-Profit Organizations!

Conference Fees: The fee covers all conference sessions, parking (See "Parking"), materials, lunch, continental breakfast and refreshment breaks. A \$25 late fee will be applied to registrations postmarked or faxed after June 14, 2010. Early registration is encouraged.

\$180 - Not-For-Profit Organization Employee

\$200 - Society members not employed by not-for-profit organizations
(and non-CPA, accounting staff of a sponsoring Society member)

\$230 - Others

CONFERENCE AGENDA & REGISTRATION FORM

- 7:45 am to 8:20 am **Registration and Continental Breakfast**
- 8:20 am to 8:30 am Welcome and Opening Remarks - *Lorraine A. Egger, CPA, NFP Committee Chairman*
- 8:30 am to 9:30 am "Part 1 - A&A Update - FAS 157, FAS 117-1, FIN48, Codification, Stimulus" - *Lee Klumpp, CPA*
- 9:35 am to 10:35 am "Part 2 - A&A Update - FAS 157, FAS 117-1, FIN48, Codification, Stimulus" - *Lee Klumpp, CPA*
- 10:45 am to 11:45 am "Charity Regulations By the Nebraska Attorney General's Office" - *Abigail M. Stempson*
- 11:45 am to 12:30 pm Lunch
- 12:30 pm to 1:45 pm "What's So Relevant About Social Media?" - *Jeff Slobotski*
- 1:50 pm to 2:40 pm **Breakout Sessions - Please select one breakout session by filling in the circle (○).**
- "2009 Form 990 Updates & IRS Resources" - *Lorraine A. Egger, CPA & Cheryl A. Teser, CPA*
 - "NFP's Fundraising Including Auction Sales" - *Ruth Karlsson*
 - "The Difference Between Audit & Finance Committees" - *Patrick A. Meyer, CPA*
- 3:00 pm to 3:50 pm "IRS and Legislative Update for Tax Exempt Organizations" - *Lorraine A. Egger, CPA*
- 3:55 pm to 4:45 pm "Behavioral Ethics in Business" - *Jeremy Wortman, Ph.D.*
- 4:45 pm Conference Adjourns

cpa

Attendee _____ Firm _____

Mailing Address Firm Home _____

Contact Name _____ Contact Number _____

Special Accommodations Needed: _____

Payment Information: Amount \$ _____ Check MasterCard Visa Expiration Date _____

Credit Card Number _____ CVV Code (on back of cc) _____

Print Card Holder's Name _____ Card Holder's Signature _____

Credit Card Billing Address, City, State & Zip _____

NEBRASKA SOCIETY OF CPAs ~ 635 S. 14TH STREET, SUITE 330, LINCOLN, NE 68508 ~ FAX 402.476.8731 ~ www.nescpa.org

15TH ANNUAL NOT-FOR-PROFIT ORGANIZATIONS' CONFERENCE SPEAKERS

LORI A. EGGER, CPA, is currently a Tax Senior Manager at KPMG LLP and specializes in tax-exempt organizations and government entities. Lori belongs to the National EXOTAX Practice within KPMG and has been practicing public accounting for over 14 years. Lori assists tax-exempt organizations with their tax compliance needs such as applying for tax exempt status, filing of annual tax returns, managing IRS and state audits and replying to IRS compliance checks, developing policies and procedures for intermediate sanctions, performing executive compensation reviews for proper 990 and W-2 reporting, structuring taxable corporations and LLC's owned by tax-exempt organizations, etc. She specializes in tax consulting and compliance for tax-exempt organizations, including hospitals, foundations and colleges. Currently, Lori is Chairman of the Nebraska Society of CPAs' NFP Committee. She has served on that committee for 9 years.

RUTH KARLSSON is a Tax Law Conferee in Taxpayer Services at the Nebraska Department of Revenue. Her primary responsibility is taxpayer education relating to sales and use tax issues. She conducts semi-annual sales and use tax seminars for the Department throughout the state, and is a frequent speaker at industry and association meetings. In addition, she works extensively with businesses, one-on-one, to assist in their understanding of Nebraska's sales and use tax laws. She has served the department as a revenue agent, and in the Tax Policy Section where her primary responsibilities were the review and implementation of legislation affecting sales and use tax.

JEFF SLOBOTSKI is the founder and lead evangelist of Silicon Prairie News, an Omaha-based organization dedicated to highlighting and supporting entrepreneurs and creatives. Slobotski is also the Director of Innovation and New Media at the AIM Institute. His role is to create and develop partnerships between business leaders and entrepreneurs in Nebraska, as well as provide resources and knowledge to the organization's members around the new and innovative ways of sharing information. The AIM Institute is a NFP which empowers communities, organizations and individuals through information technology. Additionally, Slobotski is involved with an array of community organizations, including Packs of Promise, a non-profit he founded to assist Omaha's homeless during the winter months, and the Greater Omaha Chamber's Young Professionals Council. He was appointed by Nebraska Governor Heineman to the Volunteer Service Commission and was recently named one of Omaha's Ten Outstanding Young Omahans by the Omaha Jaycees and received the Midlands Business Journal's "40 Under 40" award.

Cheryl A. Teser is a Senior Program Specialist in the Compliance Strategies Unit of Exempt Organizations in the Tax Exempt/Government Entities Operating Division of the Internal Revenue Service. In this capacity, she is assigned to a wide range of initiatives within Exempt Organizations with her major program to serve as the EO Fed/State Liaison. As the EO Fed/State Liaison, Teser is responsible for serving as a link between state governments and the IRS with respect to not-for-profit issues. She has previously held the position of the Exempt Organizations Technical Coordinator for Mandatory Review with EO Examinations and spent 10 years as a field agent performing examinations of exempt organizations throughout Nebraska. Teser received her CPA certificate in Nebraska in 1998 and is a member of the Society, a past member of the Board of Directors, and a past Chairman of the NFP Committee.

JEREMY WORTMAN, PHD, is in the field of Organizational Psychology and is the Director of Organizational Dev. for TD AMERITRADE. Jeremy is also an adjunct Professor of Management at the University of Nebraska-Lincoln and an adjunct Professor and former Program Director at Bellevue University. Jeremy holds a Ph.D. in Organizational Behavior from the University of Nebraska-Lincoln. His areas of research interest are in moral decision-making, leadership and employee engagement. He is a member of the American Psychological Association, the Society of Industrial and Organizational Psychology and the Academy of Management.

LEE KLUMPP, CPA, is a Senior Technical Manager with BDO Seidman, LLP's Institute for Nonprofit Excellence. Prior to joining BDO Seidman, Lee worked in the audit practices of Ernst and Young, LLP and KPMG. His work experience includes Researching, writing and disseminating information related to recent accounting and auditing pronouncements promulgated by FASB, GASB, the Office of Management and Budget (OMB), the GAO, the Auditing Standards Board and others that provide guidance for the nonprofit industry; Providing consultation to BDO engagement teams and BDO's alliance firms on various financial, accounting, auditing and reporting issues related to the public sector; and Preparing and presenting speeches, seminars and webinars on various accounting, auditing, internal control, governance and financial reporting topics related to public sector organizations. Klumpp's work experience includes Working with organizations in the governmental and NFP community with multiple divisions, reporting units and non-profit and for-profit entities; Significant expertise in compliance auditing of organizations receiving federal financial funding in accordance with OMB A-133; Preparing, reviewing and auditing indirect cost rates proposals; and Presenting audit reports and management letters to Boards of Directors and Audit Committees. Klumpp is an accomplished speaker who has presented on a variety of issues relating to non-profit organizations.

PATRICK A. MEYER, CPA, a Hastings Native, received his Nebraska CPA certificate in 1990, and was admitted to Partnership with HBE Becker Meyer Love LLP, CPAs in 1999. Meyer graduated from the University of Nebraska-Lincoln in 1988 and became a Certified Fraud Examiner in 2008. He specializes in general corporate, partnership and individual accounting and taxation, governmental entities and exempt organizations. He is a member of the AICPA, the Association of Certified Fraud Examiners and the Nebraska Society of CPAs of which he was Past Chairman of the NFP Committee.

ABIGAIL M. STEMPSON, a native of Tecumseh, NE, obtained a Bachelor of Science Degree in Business Administration with an emphasis in Accounting from the University of Nebraska-Lincoln in 2001 and a Juris Doctorate with an emphasis in Business from the University Of Nebraska College Of Law in 2004. She began her practice as an attorney at Vincent Law Office in Lincoln, NE where she focused on Securities and Taxation. Abigail is now in the Nebraska Attorney General's Office where she is an Assistant Attorney General in the Consumer Fraud and Antitrust Division. Her focus is mortgage fraud, general consumer fraud, and charitable matters. She is a member of the Nebraska State Bar Association and the National Association of State Charities Officials. In addition, Abigail is an adjunct professor at the University of Nebraska-Lincoln College of Business where she teaches Business Law.

THE NEBRASKA SOCIETY OF CPAs' JUNE CONFERENCES

**29TH ANNUAL NEBRASKA
GOVERNMENTAL
ACCOUNTING & AUDITING
CONFERENCE
JUNE 22 & 23, 2010**

**15TH ANNUAL
NOT-FOR-PROFIT
ORGANIZATIONS'
CONFERENCE
JUNE 24, 2010**

Location

The Cornhusker Hotel, A Marriott Hotel
333 South 13th Street, Lincoln, Nebraska

CONFERENCE DETAILS

CPE CREDIT

The **29th Annual Nebraska Governmental Accounting & Auditing Conference** qualifies for **16 hours** of continuing professional education credit, of which two hours will count towards the ethics requirement with the Nebraska Board of Public Accountancy.

The **15th Annual Nebraska Not-For-Profit Organizations' Conference** qualifies for **eight hours** of continuing professional education credit, of which one hour will count towards the ethics requirement with the Nebraska Board of Public Accountancy.

PARKING

Parking is available at The Cornhusker Hotel and all City of Lincoln parking garages. Please bring your parking garage ticket to the Conference at registration for validation. We only validate parking garage tickets for The Cornhusker Hotel and City of Lincoln parking garages.

SPECIFIC NEEDS

Please list any specific needs on your registration form and we will do our best to accommodate. Or, notify us by email (sheila@nescpa.org) or by phone (800) 642-6178 at least one week prior to the conference. Also, for your comfort, we suggest that you dress in layers to accommodate the hotel meeting rooms' varying temperatures.

HOTEL ACCOMMODATIONS

A block of sleeping rooms has been reserved at The Cornhusker for conference attendees at the special rate of **\$104** per night for a single or double. This block of rooms has been reserved under our name, The Nebraska Society of CPAs. All reservations must be received on or before **June 7, 2010**. Any reservations made after that date will be subject to availability and the hotel's guest room rates. **Reservations are made by calling The Cornhusker at (866) 706-7706 or (402) 474-7474.**

CONFERENCE REGISTRATION

Registration is available online on our website at www.nescpa.org or you can complete the registration form included in this newsletter.

The registration form for the **29th Annual Nebraska Governmental Accounting & Auditing Conference** is on page 7.

The registration form for the **15th Annual Nebraska Not-For-Profit Organizations' Conference** is on page 9.

PAYMENT

Payment can be made by one of the following:

- **Fax** a completed registration form with credit card information to the Society at (402) 476.8731.
- **Mail** a completed registration form with credit card information or check made payable to the Nebraska Society of CPAs, 635 S. 14th Street, Suite 330, Lincoln, NE 68508.

The **29th Annual Nebraska Governmental Accounting & Auditing Conference** was planned by members of the State and Local Governmental Accounting & Auditing Committee; Marcy J. Luth, Chairman.

The **15th Annual Nebraska Not-For-Profit Organizations' Conference** was planned by members of the Not-For-Profit Committee of the Nebraska Society of CPAs; Lorraine A. Egger, Chairman.