



Strategic Legal Thinking Seminars for Nonprofit Executives



Fundraising Activities: Getting All the Legal Ins and Outs Right May 13, 2009

Location:

Pfizer Conference Center

150 East 42nd Street, New York, NY 10017

with videoconference sites at:

**Atlanta, Austin, Baltimore, Boston, Chicago,
Dallas, East Palo Alto, Houston, Los Angeles,
Northern Virginia, Philadelphia, San Diego,
San Francisco, Tampa, & Washington, DC.**

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Fundraising Regulation: Getting All the Legal Ins and Outs Right May 13, 2009

As charitable organizations come under greater public scrutiny, state regulators, the Internal Revenue Service and donors are devoting more attention to how charitable organizations raise money and their compliance with applicable laws. This seminar will discuss state charities registration requirements, including the multi-state uniform registration form and common exemptions from state rules, as well as special issues related to telemarketing, internet fundraising and commercial co-ventures.

This seminar also will address the IRS rules regarding acknowledging and receipting donations, determining the value of in-kind donations, and what kinds of gifts are and are not deductible, including rules related to galas and other special events. Finally, the IRS is encouraging nonprofits to establish gift acceptance policies to accept and process non-cash donations. This seminar will discuss the legal issues involved in establishing such a policy as well as the implications of various policy options.

The speakers will include an attorney with experience in state regulation of charitable fundraising, a consultant with expertise in gift acceptance and donor acknowledgment policies and attorneys who advise nonprofits on their fundraising activities.

This course is designed for executive directors, board members, fundraising professionals and finance directors.

Moderator: **Elizabeth Guggenheimer**, Deputy Executive Director, Lawyers Alliance for New York

Speakers: **Clifford Perlman**, Partner, Perlman & Perlman
Elizabeth Guggenheimer, Lawyers Alliance for New York
Eric Javier, Vice President, CCS Fundraising
Andrew Grumet, Counsel, Schiff Hardin LLP

Program (all times are Eastern Time)

- 10:30 AM Coffee and Registration
- 10:50 AM Welcome and Opening Remarks
- 11:00 AM State Regulation of Fundraising—Getting it Right
- 12:15 PM IRS Rules Regarding Deductibility and Acknowledgement—
Understanding All the Pitfalls
- 1:00 PM Lunch
- 1:45 PM Gift Acceptance Policies—What Every Nonprofit Should Consider
- 3:15 PM Questions and Answers
- 3:30 PM Adjournment

CONFERENCE LOCATION & REGISTRATION INFORMATION*

Atlanta at:

DLA Piper LLP (US)
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** When registering, please include your name and the name and address of your organization. If you have any questions about registering at a DLA Piper site, contact Naomi Miali at 312-984-5732 or naomi.miali@dlapiper.com.*

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