

Non-Profit Update Seminar

Tuesday, July 16, 2024

Regional Learning Alliance (Western PA)

Courtyard by Marriott Harrisburg/Hershey (Central PA)

Remote (All)

Group Live/Group Internet Based

	A&A	TAX	OTHER	YB ELIG?	TOPIC
				[B]	
8:20-8:30					WELCOME AND ANNOUNCEMENTS
8:30-9:20	1.0			Y	STATE OF THE UNION - 2024 NOT-FOR-PROFIT TRENDS <i>To kick off the seminar, this session will give an overview of trends and changes impacting our non-profit clients and provide useful information to consider when analyzing financial results.</i> Amy C. Lewis, Maher Duessel
9:20-9:25					SPEAKER TRANSITION
9:25-10:15			1.0		BEST PRACTICES FOR E-PAYMENTS <i>Many organizations are employing the use of online bill payment strategies. This session will discuss best practices to ensure those strategies are conducted in the most secure and efficient way.</i> Jessica Minkus & Melanie Rutan, Bookminders
10:15-10:25					10-MINUTE BREAK
10:25-11:15		1.0		Y	NON-PROFIT TAX UPDATE <i>This session will provide updates to IRS tax law changes and other tax developments, focusing on matters that could impact the non-profit community.</i> Betsy Krisher, Maher Duessel
11:15-11:20					SPEAKER TRANSITION
11:20-12:10			1.0		ECONOMIC AND MARKET OUTLOOK <i>This session will present both short and long-term economic and investment outlooks to guide non-profits in their financial management.</i> Linda Duessel, Federated Hermes
12:10-1:10					ONE-HOUR LUNCH
1:10-2:00			1.0		REVENGE OF THE BABY BOOMERS <i>This session will explore the Baby Boomer generation's impact on the economic market.</i> Linda Duessel, Federated Hermes
2:00-2:05					SPEAKER TRANSITION
2:05-2:55	1.0			Y	A&A/SAS UPDATE <i>This session will discuss new accounting and auditing standards that may impact the non-profit sector over the next few years.</i> Nikki Walton, Maher Duessel
2:55-3:25					30-MINUTE BREAK
3:25-4:40	1.5			Y	NON-PROFIT TRIVIA <i>Test your non-profit financial reporting knowledge in an interactive session!</i> Rachel Schmidt & Shanna Brown, Maher Duessel
TOTAL POSSIBLE	3.5	1.0	3.0		TOTAL CPE CREDITS POSSIBLE ^[A]: 7.5

^[A]: CPE credits have been granted on a 50-minute hour.

^[B]: A "Y" indicates that the session meets the Government Auditing Standards 24-credit CPE requirement. It is the participant's responsibility to determine the eligibility of these sessions to meet their own Yellow Book requirements (if applicable).

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				[B]	
8:20-8:30					WELCOME AND ANNOUNCEMENTS
8:30-10:10	2.0			Y	SINGLE AUDIT UPDATE <i>This session will discuss recent developments and changes impacting Single Audits.</i> <i>Brian McCall & Samantha Strojcek, Maher Duessel</i>
10:10-10:20					10-MINUTE BREAK
10:20-11:10		1.0			EXPIRING TAX CHANGES <i>This session will discuss the 2025 expiring tax changes and the effect on charitable giving/planned giving.</i> <i>Jack Owen, Sherrard, German & Kelly, P.C.</i>
11:10-11:15					SPEAKER TRANSITION
11:15-12:05	1.0			Y	CREDIT LOSSES <i>This session will discuss the recently effective FASB ASU 2016-13, Financial Instruments - Credit Losses.</i> <i>Lisa Ritter, Maher Duessel</i>
12:05-1:05					ONE-HOUR LUNCH
1:05-1:55	1.0			Y	IT USER CONTROLS <i>This session will discuss the importance of establishing and maintaining technology controls to enhance your organization's system of internal controls.</i> <i>Shawn Strauss, Maher Duessel</i>
1:55-2:00					SPEAKER TRANSITION
2:00-2:50	1.0			Y	FRAUD <i>This is one of the scariest words in the English language. We will discuss some interesting cases and ways to prevent fraud from occurring in your own organization.</i> <i>Amy Lewis, Maher Duessel</i>
2:50-3:20					30-MINUTE BREAK
3:20-4:10	1.0				FUNDRAISING & MISCELLANEOUS TAX REGULATIONS <i>This session will discuss various laws and regulations that govern how an organization raises money.</i> <i>Dustin Starr, Maher Duessel</i>
TOTAL POSSIBLE	6.0	1.0	0.0		TOTAL CPE CREDITS POSSIBLE ^[A]: 7.0

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^[B]: A "Y" indicates that the session meets the Government Auditing Standards 24-credit CPE requirement. It is the participant's responsibility to determine the eligibility of these sessions to meet their own Yellow Book requirements (if applicable).

Prerequisites: None

Knowledge Level: Basic

Required Advance Preparation: None