

7:30 Registration

8:30 Lifecycle of a Nonprofit—Part I

- Overview of IRC Section 501(c)
- Charitable organizational and operational requirements
- Incorporation and governance documents
- Application for tax-exemption

Penny Serrurier, *Stoel Rives LLP, Portland*
Michele Wasson, *Stoel Rives LLP, Portland*

10:00 Break

10:15 Lifecycle of a Nonprofit—Part II

- State and federal registration and reporting requirements
- Board duties, responsibilities, and liabilities
- Charitable solicitations
- Fighting fraud and internal controls
- Dissolution

Susan Bower, *Department of Justice Charitable Activities Section, Portland*
Lottie Zorn, *Department of Justice Charitable Activities Section, Portland*

12:15 Award of Merit, Section Annual Meeting, and Lunch

The board will present David Atkin with the NOLS Award of Merit for his long service to the Section and nonprofit community, followed by the annual section meeting.

(Brown bag lunches are welcome or you may purchase a box lunch when registering.)

1:30 The Ethical Nonprofit Lawyer

- Who is the client?
- Who is in charge and a lawyer's obligations
- Conflicts of interest

Nellie Barnard, *Holland & Knight LLP, Portland*
Calon Russell, *Holland & Knight LLP, Portland*

2:30 Break

2:45 Donor Restrictions and UPMIFA: Perpetuity May Not Be Forever?

- Scope of the Uniform Prudent Management of Institutional Funds Act
- Prudent investing
- Endowment spending
- Release or modification of restrictions

Jeffrey Thede, *Thede Culpepper Moore Munro & Silliman LLP, Portland*

3:30 Lobbying and Political Activity

- IRC 501(h) restrictions on lobbying by 501(c)(3) organizations
- Lobbying and political activities by 503(c)(4) organizations: IRS rules about "dark money" and its growing role in influencing election campaigns
- IRC Section 527 Political Action Committees
- Federal and state lobbying registration and reporting requirements

David Atkin, *Center for Nonprofit Law PC, Eugene*

4:30 Adjourn



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Planning Committee

Susan Bower, *Department of Justice Civil Enforcement Division, Portland*

Alex Ogurek, *Peterson Law Offices, Portland*

Michele Wasson, *Stoel Rives LLP, Portland*

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