



TO: **Nonprofit Leaders, Professional Advisors, and Academics**

FROM: **Chris Cash**, President of the National Association of State Charity Officials (NASCO)  
**Dennis P. Cuevas**, Consumer Protection Project Director and Counsel (NAAG)

DATE: August 17, 2009

RE: NAAG/NASCO Annual Charitable Trusts and Solicitations Conference

**Monday, October 19, 2009**  
**Omni Austin Hotel - Downtown**  
**Austin, Texas**  
**Hotel Cut-Off Date: Saturday, September 26, 2009**

NAAG and NASCO invite you to attend the annual meeting of nonprofit leaders, professional advisors, and academics on Monday, October 19, 2009 at the Omni Austin Hotel in downtown Austin, Texas.

This conference is designed for those nonprofit leaders, professional advisors and academics who wish to stay abreast of charitable regulation issues and those who interact frequently with State charitable solicitation, registration, and enforcement officials.

This year the conference offers a mix of thought-provoking presentations by highly qualified government officials and regulators, CPA's, academics, and leading professional advisors who can speak to the unique challenges facing nonprofits and regulators in this economic climate. Our keynote speaker will be Tom McLaughlin, Director of Consulting Services for the Nonprofit Finance Fund and adjunct lecturer with Brandeis University's Heller School for Social Policy and Management. Professor McLaughlin is the author of five books focused on management issues for nonprofits, including *Nonprofit Strategic Positioning: Decide Where to Be, Plan What to Do*, which describes strategic positioning as an alternative to traditional strategic planning from the nonprofit perspective. His keynote address will focus on ways charities can deal with the current economic crisis. Later in the afternoon, he will join Jack Siegel of Charity Governance Consulting LLC (author of *A Desktop Guide for Nonprofit Directors, Officers, and Advisors: Avoiding Trouble While Doing Good*), and Barry Silverberg, Director of the Center for Community-Based & Nonprofit Organizations at Austin Community College and President & CEO of the Texas Association of Nonprofit Organizations, for a discussion about nonprofit end-of-life scenarios and considerations.

Lois G. Lerner, Director of the IRS's Tax Exempt and Governmental Entities Division will provide an update on the new Form 990 and other IRS initiatives affecting tax exempt organizations, while Roberta B. Zarin, IRS' Director of Customer Education and Outreach for Exempt Organizations will act as your guide to the abundant resources and training programs that can be found on the IRS website. Michael W. Peregrine, Esq. will provide a comprehensive and engaging update on developments in corporate governance affecting nonprofits. Marion Fremont-Smith, Adjunct Lecturer and Senior Research Fellow at Harvard University's Hauser Center for Nonprofit Organizations, and Evelyn Brody, Professor of Law at Chicago-Kent College of Law, will discuss their viewpoints on the application of trust law to corporate law, with Assistant Attorney General Eric Carriker providing the perspective of the Massachusetts Attorney General's office on the subject.

Ron Sommers, attorney for the Houston-based law firm of Nathan Sommers Jacobs, and Rob Yaquinto Jr., of the Dallas law firm of Sherman & Yaquinto, L.L.P., will follow up with a discussion of nonprofit bankruptcy issues, including work-out plans, dissolutions, and mergers.

David Spackman, Chief of the Public Charities Division of the Massachusetts Attorney General's office, will join other state regulators in identifying recent trends in hospital regulation, and Chris Cash, President of NASCO, and Robert S. Tigner, General Counsel to the Association of Direct Response Fundraising Counsel and Director of the Multi-State Filer Project, will conclude the day with an update on efforts to develop a uniform annual financial report for use in the 40 states that register charities.

## **REGISTRATION DETAILS**

The registration fee for the conference is \$325 per person (\$350 after September 25, 2009). Please return the attached registration form by September 25, 2009 to Andrew Giessel, at NAAG (see contact information below). Your registration fee includes a continental breakfast, program materials, lunch, morning and afternoon refreshments, and a reception at the conclusion of the conference.

**CLE CREDITS.** NAAG will apply for CLE credits; information will be available at the conference.

**PROGRAM MATERIALS.** Program materials will be posted at [www.nasconet.org](http://www.nasconet.org) and available for download by October 9, 2009.

## **HOTEL INFORMATION**

NAAG/NASCO has reserved a block of hotel rooms at the Omni Austin Hotel– Downtown, 700 San Jacinto at 8th Street in Austin, Texas. The conference room rate is \$142 plus tax. You must make your hotel reservations by calling the hotel toll free at 1-888-444-OMNI (6664). Please be sure to identify "NAAG/NASCO" to secure the conference room rate. Reservations must be guaranteed by a major credit card. **The deadline for securing a room reservation is 5:00 P.M. local time on Saturday, September 26, 2009.** After that date, our block will be released to the general public and reservations will be accepted on a space and rate availability basis.

## TRANSPORTATION INFORMATION

Austin-Bergstrom International Airport to the Omni Austin Hotel – Downtown is about a 25-30-minute trip via Super Shuttle or by taxi. The current fare for Super Shuttle is \$13 per person, each way. To make reservations go to <http://www.ci.austin.tx.us/austinairport/transportation.htm>, call toll-free at 1-800-258-3826 or (512) 258-3826. Tickets can also be purchased without reservations in the baggage claim area when you arrive. The Austin Super Shuttle picks up and drops off passengers directly at the Omni Austin Hotel – Downtown.

## PEOPLE TO CONTACT

NASCO: Chris Cash  
Telephone: (303) 894-2200 ext. 6407  
Email: [chris.cash@sos.state.co.us](mailto:chris.cash@sos.state.co.us)

NAAG: For **Hotel Issues**, Logistics and Program Materials, Audio Visual needs, contact NAAG as follows:

Susan Moss (Hotel Questions): Email [smoss@naag.org](mailto:smoss@naag.org)  
Andrew Giessel (Program Materials): Email: [agiessel@naag.org](mailto:agiessel@naag.org)  
National Association of Attorneys General  
Telephone: (202) 326-6018  
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**Attachments:**  
Registration Form  
Agenda

cc: