

# **2020 NAAG/NASCO Virtual Conference**

## ***Weathering the Storm***

### **Public Agenda**

**November 17-18, 2020**



**NASCO**

**National Association of  
State Charity Officials**





# PUBLIC SESSIONS

## TUESDAY, NOVEMBER 17, 2020

ALL TIMES ARE IN EASTERN TIME

1:30 pm – 1:45 pm



FUCHS



STEMPSON

### Welcome & Technology Overview

**Speakers:**

*Yael Fuchs*, NASCO President and Assistant Attorney General, New York Attorney General's Office

*Abigail Stempson*, Director, NAGTRI Center for Consumer Protection

1:45 pm – 2:15 pm



FUCHS



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### Attorney General & Secretary of State Welcome

**Description:**

New York Attorney General Letitia James, New Hampshire Attorney General Gordon MacDonald, Maryland Secretary of State John Wobensmith, and Florida Commissioner of Agriculture and Consumer Services Nikki Fried will welcome attendees to the conference.

**Moderator:**

*Yael Fuchs*, NASCO President and Assistant Attorney General, New York Attorney General's Office

**Speakers:**

*Nikki Fried*, Florida Commissioner of Agriculture and Consumer Services

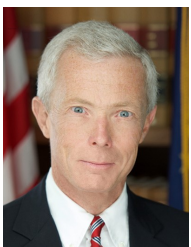
*Letitia James*, New York Attorney General, Co-Chair, NAAG Charities Committee

*Gordon MacDonald*, New Hampshire Attorney General, Co-Chair, NAAG Charities Committee

*John Wobensmith*, Maryland Secretary of State



JAMES



MACDONALD



WOBENSMTIH



Find out information about state charity law enforcement actions at [www.nasconet.org/latest-news/](http://www.nasconet.org/latest-news/).

# PUBLIC SESSIONS

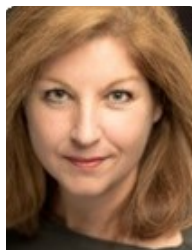
## TUESDAY, NOVEMBER 17, 2020

2:15 pm – 2:30 pm

**Break**

2:30 pm – 4:00 pm

**Plenary Session**



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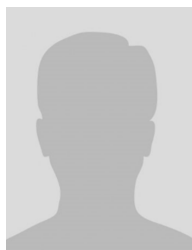
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SHEEHAN



THORLEIFSON



WASHINGTON

### STATE & FTC UPDATE

**Description:** Join us for a discussion of major regulation and enforcement priorities of the NASCO and NAAG memberships and the FTC for 2020-21.

**Moderator:** *Cindy Lott*, Professor of Practice, Academic Director, Columbia University

**Panelists:** *Leslie Friedlander*, Assistant Attorney General, Financial Litigation and Charitable Trusts Division, Texas Attorney General's Office

*Tania Ibanez*, Senior Assistant Attorney General, Charitable Trusts and Law Section, California Attorney General's Office

*James Sheehan*, Chief, Charities Bureau, New York Attorney General's Office

*Tracy Thorleifson*, Attorney, Federal Trade Commission

*Carol Washington*, Manager, Charities Division, Minnesota Attorney General's Office

**90 MINUTES GENERAL CLE**

4:00 pm – 4:15 pm

**Break**

# CLE

NAAG is applying for **270 minutes of General CLE credit** for the open portion of this conference. Final credit approval is subject to change and depends on the determination of your state's CLE organization. Your Certificate of Attendance for CLE credit will be emailed to you immediately following the conference.\* Please do not turn it into NAAG, but keep it for your own records or submit it to your state CLE organization. For specific procedural questions regarding your CLE requirements, please contact your state CLE organization.

*\*Due to the unique circumstances causing the NAAG/NASCO Conference to be held virtually, CLE will be provided to all attendees without charge for this specific conference.*

# PUBLIC SESSIONS

## TUESDAY, NOVEMBER 17, 2020

4:15 pm – 4:45 pm

### Breakout Session

#### NETWORKING

**Description:** Participants will break into smaller groups to ask questions, share insights, and network. Groups will be moderated by regulator representatives.

4:45 pm – 5:00 pm

### Wrap-Up & Evaluation



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**Speakers:** *Yael Fuchs*, NASCO President and Assistant Attorney General, New York Attorney General's Office  
*Abigail Stempson*, Director, NAGTRI Center for Consumer Protection



CENTER FOR  
CONSUMER PROTECTION

The [NAGTRI Center for Consumer Protection Monthly](#) is an email newsletter that is a compendium of information that may be of interest to the attorney general community and others interested in consumer protection. There is also a section on charities matters. To be added to the distribution list, log into your NAAG account at [portal.naag.org](http://portal.naag.org), select *My Communication Preferences*, and choose to subscribe to the *Consumer Protection Newsletter*.

***If you do not opt in to receive the newsletter using your NAAG account, you will not receive any future newsletters.***

The agenda, attendance list, additional speaker information, and other materials are available on the **NAAG Online Portal**. To access these materials, log into your NAAG account at [portal.naag.org](http://portal.naag.org), click *My Online Courses*, and click *Start Course* next to the course name.

End of Tuesday's Programming

# PUBLIC SESSIONS

## WEDNESDAY, NOVEMBER 18, 2020

1:30 pm – 1:45 pm

### Welcome

#### Speakers:

*Albert Bryant*, Charities Registration Specialist, Colorado Secretary of State  
*Kathy Smith*, Assistant Secretary of State, Maryland



BRYANT



SMITH

1:45 pm – 3:15 pm

### Plenary Session

#### NAVIGATING THE TURBULENCE: ASSET MANAGEMENT IN THE CURRENT ENVIRONMENT

#### Description:

This session will address asset management strategies—including tapping into endowments, modification of gift instruments, and mergers—and the practical and regulatory issues raised by these mechanisms.

#### Moderator:

*Michael Peregrine*, Partner, McDermott Will & Emery LLP

#### Panelists:

*Courtney Aladro*, Chief, Non-Profit Organizations/Public Charities Division, Massachusetts Attorney General's Office

*Janet Kleinfelter*, Deputy Attorney General, Public Interest Division, Tennessee Attorney General's Office

*John MacIntosh*, Managing Partner, SeaChange Capital Partners

*Eunice Nakamura*, General Counsel, Susan G. Komen

*Belle Wheelan*, President, Southern Association of Colleges and Schools Commission on Colleges

#### 90 MINUTES GENERAL CLE

The public portion of the 2021 NAAG/NASCO Conference will take place in Denver, CO on October 14 & 15, 2021, circumstances permitting. We hope to see you there!

# PUBLIC SESSIONS

## WEDNESDAY, NOVEMBER 18, 2020

3:15 pm - 3:30 pm

**Break**

3:30 pm - 5:00 pm

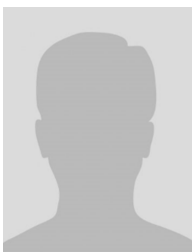
**Plenary Session**



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ARMSTRONG



BOVA



HALL



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### **RIDING THE WAVE: FUNDRAISING IN THE CURRENT ENVIRONMENT**

**Description:** This session will address solicitation of donations through both old and new forms, with a focus on the regulatory and legal issues raised by fundraising in the virtual world.

**Moderator:** *Cynthia M. Lewin*, Co-Chair, Non-Profit Organizations Practice, Venable LLP

**Panelists:** *Brian Armstrong*, Deputy Attorney General, California Department of Justice

*Francis Bova*, Trust and Safety Team, GoFundMe

*Sara Hall*, Chief Legal Officer, St. Jude Children's Research Hospital

*Brian Yacker*, Managing Partner, YH Advisors

**90 MINUTES GENERAL CLE**

5:00 pm - 5:10 pm

**Wrap-Up & Evaluation**



SMITH

**Speaker:** *Kathy Smith*, Assistant Secretary of State, Maryland

**Thank you for attending the 2020 NAAG/NASCO Virtual Conference!**

*NASCO and NAAG wish to thank the members of its agenda advisory committees for their input and commitment.*