

2018 OSCPA Not-for-Profit Conference

Monday, April 30, 2018
Oregon Convention Center
777 NE Martin Luther King Jr. Blvd.
Portland, OR 97232

CPE: 8 hours
Level: 4 (Update)
Event: #10200



Who will benefit?

CPAs and other accounting professionals in the not-for-profit sector.

Developed by:

Oregon Society of Certified Public Accountants
Not-for-Profit Strategic Committee



Schedule: Monday, April 30, 2018

CPE: 8 hours • Level: 4 (Update) • Qualifies for Yellow Book CPE based on your unique audited entity.

- 7:15 a.m. *Registration Desk Opens / Networking Begins*
- 8:00 a.m. *Welcome and Opening Remarks*
Robert M. Prill, CPA, 2017-18 Not-for-Profit Conference Chair
Hoffman Stewart & Schmidt PC, Lake Oswego, OR
- 8:05 a.m. **Beyond the Headlines**
Louis J. Mezzina, CPA, KPMG LLP, New York, NY
- 9:15 a.m. **FASB Update**
Richard A. Cole, CPA, CGMA, Financial Accounting Standards Board, Norwalk, CT
- 10:15 a.m. *Refreshment Break*
- 10:30 a.m. **Concurrent Session A: (select one)**
- A1: Troublesome 990 Topics**
Jason R. Orme, CPA, Talbot Korvola & Warwick LLP, Lake Oswego, OR
Jennifer Becker Harris, CPA, MS Taxation, Clark Nuber PS, Bellevue, WA
- A2: FASB Deep Dive**
Richard A. Cole, CPA, CGMA, Financial Accounting Standards Board, Norwalk, CT
- A3: Diversity, Equity, and Inclusion Best Practices: What's Working in Organizations?**
Joseph Wahl, Wahl and Associates LLC, Tigard, OR
- 11:25 a.m. *Change Break*
- 11:30 a.m. **Concurrent Session B: (select one)**
- B1: Governance**
Louis J. Mezzina, CPA, KPMG LLP, New York, NY
- B2: Uniform Grant Guidance – Pitfalls and Implementation Tips**
Tonya M. Moffitt, CPA, Merina & Company LLP, West Linn, OR
- B3: Fraud – Nonprofits Beware**
Tiffany Couch, CPA, CFF, CFE, Acuity Group PLLC, Vancouver, WA
- 12:25 p.m. *Luncheon*
- 1:25 p.m. **Concurrent Session C: (select one)**
- C1: Blockchain Technology and Cryptocurrencies 101**
Scott Bigelow, Blockchain Developer, Augur Project, Portland, OR

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C2: Employee Benefit Plans: Options for Nonprofits

Thomas I. Kramer, Attorney, Bullard Law, Portland, OR

C3: Risk Alert: Not-for-Profit Entity Industry Developments

Robert M. Prill, CPA

Hoffman Stewart & Schmidt PC, Lake Oswego, OR

2:20 p.m.

Change Break

2:25 p.m.

Tax and Regulatory Update

Jane M. Searing, CPA, MS Taxation, Clark Nuber PS, Bellevue, WA

3:25 p.m.

Refreshment Break

3:40 p.m.

Cyber Security: Why You Got Hacked (and How to Make Sure It Does Not Happen Again)

Kevin Villanueva, CISA, CISSP, CCSFP, PCI QSA, HITRUST CCSFP
Moss Adams LLP, Seattle, WA

4:40 p.m.

Closing Remarks

Jennifer A. Perrier, CPA, 2018-19 Not-for-Profit Conference Chair
Hoffman Stewart & Schmidt PC, Lake Oswego, OR

4:45 – 6:00 p.m.

Networking Reception

Oregon Society of CPAs Not-for-Profit Conference Planning Subcommittee

A special thanks to the following committee members who participated in the planning of the 2018 Not-for-Profit Conference.

Robert M. Prill, *Conference Chair*

Jennifer A. Perrier, *Conference Vice Chair*

Shirley D. Cyr, *Committee Chair*

Gary N. McGee, *Board Advisor*

Cynthia A. Barber

Anna Barnsley Werblow

Cynthia P. Bartholomew

James H. Brinkman

Gerald W. Burns

Sydney J. Chatterton-Cuttlers

Michael K. Farnsworth

Tamara L. Graham

Michele C. Henney

Brenda D. Hodges

Todd D. Kimball

William S. Manne

Jenna S. McRae

Tonya M. Moffitt

Kristina L. Oliveira

Cheryl R. Olson

Mysten N. Shenker

Sandra A. Suran

Suzanne B. Taylor

Jennifer A. Thompson

Kellie R. White

Robert G. Yingling Jr.

OSCPA Administration

Chase Brunson, Conference Manager, Member Services & Professional Development

Lily Fry, Director, Member Services & Professional Development

Registration includes: Conference materials, refreshment breaks and luncheon. Vegetarian and special dietary needs available – 5 days advance notice required.

Cancellation / No-Show Policy: Cancellations received 8 or more days prior to the conference will incur no penalty. Cancellations received 7 or fewer days prior to the event will be charged a \$25.00 cancellation fee or, without penalty you may **at the time of cancellation:** 1) send a substitute; or 2) transfer your registration to another event of your choice. Registration fees can be transferred any time prior to the event date and will incur no penalty. Requests for refund or transfer on or following the event date cannot be honored. Refunds will be returned to company/individual issuing original payments. No-show registrants will receive event materials.

Policies & Guidelines: For a complete listing, including the recording policy, refer to the Policies & Guidelines at orca.org/news-resources/16:cpe. In case of unforeseen circumstances, speakers and topics are subject to change.



OSCPA
PO Box 4555
Beaverton, OR 97076-4555

2018 Not-for-Profit Conference – #10200 – April 30, 2018

Member Fee: \$320 / Nonmember Fee: \$395

OSCPA Members' Guests/Clients Fee: \$245*

**Special Offer for Guests/Clients of OSCPAs Members: Invite other not-for-profit professionals to attend the 2018 Not-for-Profit Conference for only \$245 per person! Guests/Clients must reference your name or enter it on the registration form when registering by phone, fax, or mail. Online registration is unavailable for guests/clients. Not applicable to OSCPAs members or CPAs eligible for membership. Uncertified colleagues of OSCPAs members qualify for the member fee.*

Name: _____

OSCPA Member #: _____

Business Address: _____

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Check payable to OSCPAs

Check One: Visa Mastercard AMEX Discover

Check One: Business Card Personal Card

Cardholder Name: _____

Card #: _____

Amount Paid \$: _____ Exp. Date: _____

Signature: _____

REGISTRATION OPTIONS

- WEB:** orcpa.org/cpe/10200
- FAX:** registration form and credit card to: 503-626-2942
- MAIL:** registration form and payment to: OSCPAs, PO Box 4555, Beaverton, OR 97076-4555
- QUESTIONS:** Contact OSCPAs at 503-641-7200 / 800-255-1470, ext. 3 / Website: orcpa.org / Email: profdev@orcpa.org

Concurrent Session A (select one)	
<input type="checkbox"/>	A1: Troublesome 990 Topics
<input type="checkbox"/>	A2: FASB Deep Dive
<input type="checkbox"/>	A3: Diversity, Equity, and Inclusion Best Practices
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<input type="checkbox"/>	C3: Risk Alert: Not-for-Profit Entity Industry Developments

PLEASE CHECK ALL THAT APPLY:

- OSCPAs Member
- Nonmember guest/client of an OSCPAs Member
Member's Name: _____
- Member of _____ State CPA Society
- Uncertified staff of OSCPAs Member. Employee not eligible for membership
- Special/Dietary Needs: _____

Receive course materials as (select one):



- Paperless (You will be emailed a link to the PDF materials three days prior to the conference)
- Hard copy (Printed materials will be provided to you at the conference)