

## 990's DO Matter

Thursday, November 13, 1:00 – 5:00 p.m.

*Awards 4 CPE's for Accountants*

*Target Audience: CFO's, Board members, Executive Directors, plus CPA's, accountants, paid preparers, and accounting staff*

This seminar provides an easy and practical understanding of the important functions and implications of Form 990 reporting. The current Form 990/990-EZ and the upcoming Redesigned 990 will be discussed. Topics include:

- Key components of the Forms that provide “information to the public” (not just the IRS)
- Challenges nonprofits commonly face in completing the Form
- How to put the organization’s “best foot forward” in reporting programs, executive’s compensation, governance, and fundraising activities
- How the IRS has expanded the current Form’s “meatiest” parts and brought some answers up to a front “summary page”
- Transition schedule that postpones small organizations’ use of the Redesigned Form 990 if they are willing to use the Form 990-EZ

## Redesigned Form 990

Friday, November 14, 8:30 a.m. – 4:45 p.m.

*Awards 8 CPE's for Accountants*

*Target Audience: CPA's, accountants, paid preparers, and accounting staff*

This seminar approaches the Redesigned Form 990 from a practical perspective and examines the Form on a part-by-part basis. As the 990 moves away from pure “tax reporting” and more to “capacity” and “accountability” reporting, the seminar focuses on understanding detail and recordkeeping required, rather than tax law enunciation.

Topics include:

- Expanded disclosures on compensation provided to trustees/directors, officers, “key employees,” and “High 5’s”
- New “Governing Body and Management” and “Policies” Sections
- New “Summary” page and “Program Services Accomplishments” reporting
- New Schedule L—“Transactions with Interested Persons” reporting
- Changes to Public Support Test reporting/qualification
- New Schedules for: non-cash contributions, fundraising, related organizations, political/lobbying, grantmaking, and foreign activities
- Handling disclosures required or permitted on the “Overflow” Schedule

## About the Instructor

Author and instructor Eve Borenstein has taught Form 990 essentials for almost two decades to both CPA’s and to non-profit organization managers. She co-chairs the American Bar Association’s Tax Section, Exempt Organizations Form 990 Task Force and is a member of the AICPA Form 990 Task Force. Ms. Borenstein has worked extensively with the IRS throughout 2007 and 2008 in developing the redesigned Form 990. She is a practicing attorney who has exclusively served tax-exempt organizations nationally over the past 20 years, and is a managing partner of Borenstein and McVeigh Law Offices, LLC in Minneapolis, MN.

## Registration

\_\_\_\_\_ 990's DO Matter (\$110 “Early Bird;” \$120 after October 31)

\_\_\_\_\_ Redesigned Form 990 (\$155 “Early Bird;” \$170 after October 31)

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Social Security Number (*last four digits only*) \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ Work Phone ( ) \_\_\_\_\_

Employer Name: \_\_\_\_\_

### Payment

\_\_\_\_\_ Check (*please make payable to Utica College*)

\_\_\_\_\_ Credit Card (*please circle: MasterCard, Visa, American Express, or Discover*)  
Card No. \_\_\_\_\_

Exp. Date \_\_\_\_\_ Security Code \_\_\_\_\_

\_\_\_\_\_ Invoice my Company – Att.: \_\_\_\_\_

Registration and inquiries: Utica College, Office of Corporate and Professional Programs, 1600 Burrstone Road, Utica, NY 13502-4892

Phone: (315) 792-3344 Fax: (315) 792-3139

*The seminar fee includes breaks, lunch, and all materials. Cancellations received through October 31 are refundable. No refunds after October 31, 2008. Substitutions may be made at any time. Utica College reserves the right to cancel the program due to insufficient enrollment or circumstances beyond our control.*

The Community Foundation of Herkimer and Oneida Counties, Inc. and Utica College are pleased to partner in providing the *Second Annual Special Topics Seminar: Form 990*. This unique learning opportunity provides continuing professional education specifically for nonprofit organizations. It is our hope that this educational partnership will continue to be an annual event.

## For over half a Century ...

The Community Foundation of Herkimer and Oneida Counties, Inc. has raised the capacity of nonprofit organizations to serve the community.



Utica College has provided educational opportunities to many, including adults seeking continuing professional education.



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# Second Annual Special Topics Seminar: Form 990



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Hosted by

The Community Foundation  
of Herkimer & Oneida Counties, Inc.

and

Utica College

