

Nonprofit Executive Summit:

Bringing Nonprofit Leaders Together to Discuss Legal, Finance, Tax, and Operational Issues Impacting the Sector

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Featured Speakers and Panelists:

Name	Title	Company	Bio	
Tiffany P. Smith, Esq.	Tax Counsel	U.S. Senate Committee on Finance, Majority Staff	<p>Ms. Smith is currently Tax Counsel for Chairman Max Baucus's staff of the United States Senate Committee on Finance. She handles tax issues relating to tax exempt organizations and individuals, including estate and gift tax, alternative minimum tax, and education tax incentives.</p> <p>Prior to working with the Senate Finance Committee, Ms. Smith worked with the Office of Chief Counsel for the Internal Revenue Service. While with the Office of Chief Counsel, Ms. Smith held the positions of Assistant to the Branch Chief and Attorney-Advisor, working on procedural issues.</p> <p>Ms. Smith was also an Assistant Chief Counsel for the City of Chicago's Office of Chief Counsel. She handled local tax issues in the Regulatory and Aviation Litigation Division.</p> <p>Ms. Smith received her undergraduate and law degrees from the University of Illinois in Champaign-Urbana, and her LL.M in Taxation from Georgetown University. Ms. Smith is licensed to practice law in Illinois and Virginia.</p>	
Jeffrey S. Tenenbaum, Esq.	Partner and Chair of the Nonprofit Organizations Practice	Venable LLP	<p>Jeffrey Tenenbaum chairs Venable's Nonprofit Organizations Practice Group. He is one of the nation's leading nonprofit attorneys, and also is an accomplished author, lecturer, and commentator on nonprofit legal matters. Based in the firm's Washington, DC office, Mr. Tenenbaum counsels his clients on the broad array of legal issues affecting charities, foundations, trade and professional associations, think tanks, advocacy groups, and other nonprofit organizations, and regularly represents clients before Congress, federal and state regulatory agencies, and in connection with governmental investigations, enforcement actions, litigation, and in dealing with the media. He also has served as an expert witness in several court cases on nonprofit legal issues.</p> <p>Mr. Tenenbaum was the 2006 recipient of the American Bar Association's Outstanding Nonprofit Lawyer of the Year Award, and was an inaugural (2004) recipient of the <i>Washington Business Journal's</i> Top Washington Lawyers Award. He was one of only seven "Leading Lawyers" in the Not-for-Profit category in the prestigious 2012 <i>Legal 500</i> rankings, and one of only eight in the 2013 rankings. Mr. Tenenbaum was recognized in 2013 as a Top Rated Lawyer in Tax Law by <i>The American Lawyer</i> and <i>Corporate Counsel</i>. He was the 2004 recipient of The Center for Association Leadership's Chairman's Award, and the 1997 recipient of the Greater Washington Society of Association Executives' Chairman's Award. Mr. Tenenbaum was listed in the 2012-14 editions of <i>The Best Lawyers in America</i> for Non-Profit/Charities Law, and was named as one of Washington, DC's "Legal Elite" in 2011 by <i>SmartCEO Magazine</i>. He was a 2008-09 Fellow of the Bar Association of the District of Columbia and is AV Peer-Review Rated by <i>Martindale-Hubbell</i>. Mr. Tenenbaum started his career in the nonprofit community by serving as Legal Section manager at the American Society of Association Executives, following several years working on Capitol Hill as a legislative assistant.</p>	

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<p>John P. Langan, CPA</p>	<p>Managing Partner, Public Sector Group</p>	<p>CliftonLarsonAllen</p>	<p>John P. Langan, CPA is the Managing Partner of the Public Sector Group at CliftonLarsonAllen, LLP (CLA) a top 10 national accounting and consulting firm. Before joining CLA and its predecessor LarsonAllen, Mr. Langan was the Founder and Managing Partner of Langan Associates, PC an exclusive DC area provider of not-for-profit accounting, tax and consulting services. The Public Sector Group at CLA is the firm's largest industry group with over \$100M in annual billings serving over 8,000 nonprofits, state and local governments and institutions of higher education.</p> <p>Mr. Langan established Langan Associates in 1988 after several years with the international accounting firm of Arthur Andersen. He has nearly 30 years of experience serving not-for-profit organizations and has a national reputation as an expert, author and presenter on financial, tax and technology topics facing not-for-profit organizations. He has served major not-for-profit organizations including the American Public Transportation Association, Biotechnology Industry Organization, National Telecommunications Cooperative Associations, Cotton Council International, United Way Worldwide among many others.</p> <p>Mr. Langan is a member of the American Institute of CPA's, Greater Washington Society of CPA's and Virginia Society of CPA's. He Chairs the audit committee at Lynn University, is Treasurer for the Pentagon Memorial Fund, is a board member for Boys & Girls Clubs of Greater Washington (Alexandria Branch) and serves on the CLA Board of Directors.</p>	
<p>Dr. Kevin M. Ross</p>	<p>President</p>	<p>Lynn University</p>	<p>Dr. Kevin M. Ross became the fifth president of Lynn University on July 1, 2006. Dr. Ross took leadership of the university at a young age: 33, having held numerous administrative positions in educational institutions, including Lynn. Early in his career, Dr. Ross served as admissions officer and associate director of admissions at two independent schools, The Hill School (Pottstown, Pa.) and Avon Old Farms School (Avon, Conn.). His first higher education post was assistant to the president of Wilmington College (Wilmington, Del.).</p> <p>Dr. Ross came to Lynn in 1999 as associate dean of the Eugene M. and Christine E. Lynn College of International Communication, where he facilitated installation of its state-of-the-art broadcast journalism curriculum, studios and equipment. Dr. Ross also served as director of special projects, director of development and vice president of institutional advancement before being named chief operating officer (COO) in 2004.</p> <p>As COO, Dr. Ross initiated and oversaw completion of Lynn's long-range strategic plan with the aid of the late Dr. George Keller, noted higher education strategic planning expert and author of Academic Strategy: The Management Revolution in American Higher Education. The long-range plan, titled Lynn 2020, provides a blueprint for developing Lynn University over 15 years. Six years into Dr. Ross' presidency—and as the university celebrates its 50th year—many of the plan's major initiatives have come, or are well on their way, to fruition.</p>	

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<p>Chris J. Brantley</p>	<p>Managing Director</p>	<p>IEEE-USA</p>	<p>Chris J. Brantley is managing director of IEEE-USA and serves on the IEEE Management Council, as part of the executive team that provides oversight and strategic direction to IEEE's business operations. Prior to joining IEEE as a government relations manager in 1989, Brantley worked for the American Association of Engineering Societies. He holds a juris doctorate in law and master's degree in international affairs from the American University's Washington College of Law and School of International Service, respectively. He is also a member of the Georgia Bar and an adjunct Professor at the Washington College of Law, where he teaches graduate seminars on international courts.</p>	
<p>Andrew Watt, FInstF</p>	<p>President & CEO</p>	<p>Association of Fundraising Professionals</p>	<p>Andrew Watt, FInstF, is president and chief executive officer of the Association of Fundraising Professionals (AFP), the professional association of individuals responsible for generating philanthropic support for nonprofit organizations. AFP is the largest community of fundraising professionals in the world and has 30,000 members in more than 200 chapters. In his role, Andrew serves on the board of directors for AFP, the AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy-Canada, and also leads the association's professional staff in Arlington, Va.; Toronto, Ontario and Mexico City.</p> <p>Andrew joined AFP as vice president for international development in 2006 and was promoted to chief programs officer in 2008, where he led the Membership and Professional Advancement Divisions of AFP. He also served on the AFP Executive Team that was responsible for the day-to-day operational decisions of the association.</p> <p>From 1993-2005, Andrew was employed by the Institute of Fundraising in the United Kingdom, a professional membership organization for fundraising professionals. He served in several capacities there, ultimately as deputy chief executive. In 2006, Andrew was made an Honorary Fellow of the Institute of Fundraising in recognition of his extraordinary service to the profession.</p> <p>Andrew has been a strong proponent of the value of the nonprofit community and fundraising throughout his career. Viewing nonprofits as a critical interface between the public and government, he has long emphasized the importance of forging strong consensus-based coalitions both within the philanthropic community and between the public and private sectors that demonstrate the value and impact of charities and their work.</p> <p>Andrew has served as both a volunteer and board member of many nonprofit organizations. He is currently chairman of the American Friends of Winchester College and an adjunct faculty member of St. Mary's University of Minnesota where he teaches on the globalization of philanthropy.</p>	

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<p>George E. Constantine, Esq.</p>	<p>Partner and Co-Chair of the Regulatory Practice Group</p>	<p>Venable LLP</p>	<p>George Constantine concentrates his practice exclusively on providing legal counseling to and advocacy for nonprofit organizations, including trade associations, professional societies, advocacy groups, charities, and other entities. He has extensive experience with many of the major legal issues affecting nonprofit organizations, including contracts, tax, antitrust, governance, and political activity matters.</p> <p>Mr. Constantine has represented Internal Revenue Code § 501(c)(3), 501(c)(4) and 501(c)(6) clients on a number of critical tax-exemption matters, including representing clients that are undergoing Internal Revenue Service examinations challenging their exempt status; he has assisted associations and other nonprofit organizations going through mergers, consolidations, joint ventures, and dissolutions; and he has provided ongoing counseling on numerous transactional and governance matters that are unique to nonprofit organizations.</p> <p>Mr. Constantine serves on the Legal Section Council of the American Society of Association Executives. In addition, Mr. Constantine is the former Staff Counsel of the American Society of Association Executives (ASAE), the 25,000-member national society for trade and professional association executives. As ASAE's sole staff attorney, he gained in-depth experience with the many legal issues facing associations. He also represented ASAE's interests before Congress and federal agencies. Mr. Constantine co-chairs Venable's Regulatory Practice Group.</p>	
<p>Matthew T. Journy, Esq.</p>	<p>Associate</p>	<p>Venable LLP</p>	<p>Matt Journy is an associate in Venable's Washington, DC office, where he practices in the Nonprofit Organizations and Associations Practice Group. In his practice, Mr. Journy counsels trade and professional associations, public charities, private foundations, and other nonprofits on a variety of tax, governance, and general corporate matters, including tax exemption applications, audits, tax planning, joint ventures, unrelated business income tax issues, lobbying, and charitable solicitation, among other issues.</p> <p>Mr. Journy also represents nonprofit clients in tax disputes with the IRS. Mr. Journy has represented clients before the IRS during each stage of the IRS examination process, including: the examination stage and administrative appeals process. If the tax controversy is not resolved administratively, Mr. Journy represents the client in court litigation, typically in U.S. Tax Court.</p> <p>Mr. Journy has appeared frequently before the IRS National Office, representing clients in requests for private letter rulings or technical advice memoranda.</p> <p>Having worked both as a regulator and tax consultant in the nonprofit community, Mr. Journy draws upon his prior experience to provide clients with reliable and thorough advice on the wide array of legal issues faced by nonprofits. Before joining Venable, Mr. Journy worked at Ernst & Young, LLP in the National Tax Practice, where he provided nonprofit clients with tax advice relating to corporate reorganizations, expenditure responsibility for international grants, fundraising activities, commercial co-ventures, unrelated business income, and post-issuance compliance for private activity bonds. In addition to providing tax advice, Mr. Journy provided tax compliance services, including the technical review of various federal and state tax and information returns. Prior to joining Ernst & Young, Mr. Journy worked in the Tax-Exempt/Government Entities Division of the IRS Office of Chief Counsel, where he prepared legal and technical advice for field agents and composed legal memoranda on a variety of issues affecting tax-exempt organizations.</p>	

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<p>Robert C. Harris, CAE</p>	<p>President & CEO</p>	<p>Non Profit Resource Center</p>	<p>Bob has 25+ years of experience with associations, chambers and other nonprofits. His seminars are interactive, focused on core-knowledge and organizational (realistic) capacity. He utilizes case studies, trends and headlines for board orientation, training, strategic planning, staff training and consulting. He is the author of Association Management 101 Online©; creator of the Association Self-Auditing Process© and co-author of “Building an Association Management Company.</p> <p>He is known around the world for sharing best practices and promoting sustainability of associations and chambers. Bob’s specialties are: Strategic Planning - without games and group hugs; Board Roles and Responsibilities - customized to the organization; and Staff Training (risk, efficiency, policy mgmt., governance, etc.).</p>	
<p>Ben Aase</p>	<p>Principal, Public Sector Group</p>	<p>CliftonLarsonAllen</p>	<p>Ben Aase is a Principal with CliftonLarsonAllen, where he provides national leadership to the firm’s nonprofit and public sector strategic, financial, and operational consulting and advisory services.</p> <p>Ben personally leads projects for a range of nonprofit, foundation, and governmental clients nationwide with a particular focus on the K—12 education, foundation, and arts and cultural sub-sectors. Prior to joining CliftonLarsonAllen Ben co-founded a company that provides outsourced accounting and financial advisory services to the K—12 education market.</p> <p>Ben is a licensed consultant for the Standards for Excellence Institute, having received extensive training in how to provide training, consulting, and support on the Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector.</p> <p>Ben is currently board Treasurer of the Givens Foundation for African American literature, and a founder of the Minneapolis Professional Chapter of Net Impact, an international nonprofit organization whose mission is to make a positive impact on society by growing and strengthening new leaders who use business to improve the world. Ben is also a review board member for the Social Entrepreneur division of the Minnesota Cup, the largest state-wide new venture competition in the country that seeks out aspiring entrepreneurs and their breakthrough ideas.</p>	
<p>Armand J. (A.J.) Zottola</p>	<p>Partner</p>	<p>Venable LLP</p>	<p>Working at the intersection of commerce and technology, A.J. Zottola focuses his practice on the exploitation of intellectual property, intangible, and technology assets in business and strategic relationships.</p> <p>Mr. Zottola’s skills enable him to handle all types of issues, negotiations, and agreements involving intellectual property; franchise; privacy; information security; contract; and business tort law.</p> <p>His extensive experience also helps clients resolve and craft settlement arrangements for misappropriation and infringement matters and for disputes involving commercial and licensing agreements. In addition, he regularly counsels clients on intellectual property, e-commerce and privacy issues, and prosecutes and manages U.S. and foreign trademark and copyright portfolios.</p> <p>His in-depth knowledge helps clients achieve practical and creative solutions to procure, exploit, manage and protect their intangible and proprietary assets. Whether resolving employer/employee intellectual property ownership issues, assessing new technology developments, or acquiring technology assets through mergers and acquisitions, Mr. Zottola assists a variety of companies and funding sources in maximizing asset value, identifying new opportunities for business expansion and generation, and preventing the unwanted loss or infringement of proprietary rights.</p>	

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<p>Mark A. Eich, CPA, CISA</p>	<p>Principal, Information Security Group</p>	<p>CliftonLarsonAllen</p>	<p>Mark is Partner in charge of the Information Security Group at CliftonLarsonAllen. He has over 24 years of experience in auditing and technology consulting. In this position, he has actively led many IT audits and security assessments for clients in a range of industries and with a diversity of operating environments. He leads a team of technology and industry specialists in an efficient approach to provide security analyses that are balanced with business needs. Information security assessments include: network penetration services; internal network security assessments; information security general controls; information security policies and procedures assessment / consulting; and incident response and electronic fraud investigation.</p> <p>Mark has long recognized the need for IT auditing and consulting services that integrate with and complement the internal audit function. He emphasizes the integration of business issues into the overall framework of IT security to ensure that business requirements are met in a sound and secure manner.</p> <p>Mark, a Certified Public Accountant, earned the Certified Information System Auditor (CISA) designation from the Information Systems Audit and Control Association (ISACA) in 1995. He is a frequent speaker on information security topics at national conferences and has delivered over 100 presentations on multiple topics. He currently serves on the Data Integrity Task Force for the AICPA.</p> <p>Mark is a nationally recognized speaker on information security topics. He has been engaged by the Independent Community Bankers Association to provide semi-annual IT audit training for bank internal auditors.</p>	
<p>Jefforie A. Kvilhaug, CPA</p>	<p>Managing Partner, Global Services</p>	<p>CliftonLarsonAllen</p>	<p>Jeff Kvilhaug leads CliftonLarsonAllen's Global Services practice. Jeff specializes in business and financial consulting, as well as assurance and tax services.</p> <p>Since 1984, Jeff has been providing strategic and financial consulting and assurance services for closely held, middle market clients primarily in the manufacturing and distribution industry. In addition to the traditional assurance and tax engagements, his experience includes projects in reducing cycle-time, analyzing performance measurement systems, developing strategic plans, performing financial and operational due diligence engagements associated with mergers and acquisitions, and implementing supply chain and process improvements for manufacturers and distributors. Based on his impact on his client's businesses, Jeff was recognized as a 2009 Financial Impact Leader by Business Leader Magazine.</p> <p>Jeff has a bachelor of science degree in accounting from Southwest Minnesota State University. His professional affiliations include membership in the American Institute of Certified Public Accountants (AICPA), as well as various state associations. He is active in supporting a variety of national, regional, and state manufacturing related trade associations. Jeff is a frequent speaker on a variety of manufacturing topics including Succession Planning, Supply Chain Management, Cycle Time Reduction, Kaizen, Process Improvement, Cost Containment, and Performance Measurement. He has also published numerous articles.</p>	

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Carrie A. Kroll, Esq.	Associate	Venable LLP	<p>Carrie Kroll's practice focuses on a wide range of international trade issues at Venable, including advising companies on compliance with import and export control laws and regulations before numerous regulatory authorities, such as the U.S. Customs and Border Protection (CBP), International Trade Commission, Commerce Department's Bureau of Industry and Security (BIS), State Department's Directorate of Defense Trade Controls (DDTC), Treasury Department's Office of Foreign Assets Control (OFAC), and the Committee on Foreign Investment in the United States (CFIUS).</p> <p>Ms. Kroll has experience counseling multinational companies on export controls compliance, including overall license authorization and registration needs. She has assisted clients in assessing and developing internal compliance programs, including compliance training on U.S. export and import laws. She has also worked on voluntary disclosures and has defended exporters facing investigations for alleged violations of U.S. export control laws.</p> <p>Ms. Kroll has also advised multinational companies in the transportation and logistics sectors; avionic, high technology, petrochemical, pharmaceutical, food and retail industries; as well as trade associations, on international transactional matters and conducting trade activities overseas. She regularly provides guidance regarding compliance with the anti-bribery provisions of the U.S. Foreign Corrupt Practices Act.</p> <p>Ms. Kroll maintains an active pro bono practice, including legal work to support the relief efforts undertaken by NGOs in the land tenure and anti-corruption sectors in Haiti after the 2010 earthquake. Additional pro bono experience includes handling asylum and landlord-tenant cases in DC and Maryland.</p>	 A professional headshot of Carrie A. Kroll, Esq. She is a woman with blonde hair pulled back, wearing a dark blazer over a light-colored collared shirt. She is smiling and looking directly at the camera. The background is a blurred office setting.
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