



# Not-for-Profit

## SYMPOSIUM



*Navigating Trends.  
Defining the Future.*

# 6.4.26

**In-Person Experience!**

Gleacher Conference Center, Chicago, IL

Time: 8:25<sup>AM</sup> - 4:50<sup>PM</sup> - Program

4:50<sup>PM</sup> - 5:30<sup>PM</sup> - Networking Reception

CPE: 8 Credits CLE: 7 (pending)

# 6.5.26

Virtual Half-Day  
Bonus Conference

Thank You to Our Sponsors



BRILLIANT.

**First Bank Chicago**

\*\*\*\*\*  
Your Interest Is Our Priority



Register by May 14 and Save \$30

Cost: \$405 M | \$505 NM

[www.icpas.org/nfps](http://www.icpas.org/nfps)





Join not-for-profit professionals and those who support them for a day focused on risk, governance, and practical strategies you can apply immediately.

## June 4, 2026 Agenda

7:45<sup>AM</sup> - 8:25<sup>AM</sup>

### Registration and Networking Breakfast

8:25<sup>AM</sup> - 8:30<sup>AM</sup>

### Welcome Remarks

**Geoffrey Brown, CAE** - President and CEO, Illinois CPA Society

8:30<sup>AM</sup> - 9:20<sup>AM</sup>

General Session

### The Future of Not-for-Profits: Trends, Risks, and Opportunities



Funding pressure, workforce constraints, and rising compliance demands are reshaping the sector. Add increasing service expectations and rapid technological change, and the path forward isn't always clear. Understand what's changing and where risks and opportunities are emerging, along with how to adapt and strengthen financial resilience.

**Cathy Yen, MA, MBA, CCLP** - Founder, The Nonprofit Planner

9:30<sup>AM</sup> - 10:20<sup>AM</sup>

Concurrent Sessions .....

### A Boost Your Endowment IQ: From Quasi to Restricted

Clarify how donor-restricted, board-designated (quasi), and other endowments function and how they flow through financial reporting. Review a practical framework for tracking contributions, investment returns, and spending. Explore core investment policy considerations, allocation approaches, and governance questions to help mitigate risk.

**David Robydek, MBA** - Principal, CLA

**Melissa Struck, CPA** - Nonprofit Principal, CLA

### B Key Tax Issues and IRS Developments

Get up to speed on recent tax legislation and IRS activity impacting tax-exempt organizations. Review key audit focus areas, including the reinstatement of group rulings, recent court cases, and charitable contribution changes, while exploring what those developments mean for compliance.

**Emily Beckerman, CPA** - Senior Manager, Exempt Organizations, EY

**Katherine Kurtzman, CPA** - Managing Director, EY

10:30<sup>AM</sup> - 11:20<sup>AM</sup>

Concurrent Sessions .....

### A Building Financial Resilience: Investment Policies That Withstand Market Volatility

Strengthen your approach to governance, investment policy, and reserve strategies in times of market volatility. Support more disciplined decision-making, protect liquidity, and navigate uncertainty with greater confidence.

**Matthew Babiash, CPA, FRM** - Senior Research Analyst, Marketable Alternatives, Fiducient

### B Multistate Charitable Governance: Regulatory Focus

State regulators play a critical role in charitable oversight. Review current enforcement trends, priorities, and initiatives across jurisdictions—and what they mean for compliance, risk, and day-to-day operations.

**Kristin Louis, JD** - Bureau Chief, Charitable Trust Bureau, Illinois Attorney General

**Beth Short** - Director of Charitable Outreach and Education, Charitable Organizations, Ohio Attorney General's Office

11:30AM - 12:20PM

Concurrent Sessions .....

### A Improving Financial Communication With Boards

Clear financial communication is critical to effective board oversight. Review real-world examples, common breakdowns, and tips and tricks that lead to stronger understanding and better decision-making.

**Kandace Lenti** - President and Managing Director, Government, Not-for-Profit, Healthcare, and Education Banking, Wintrust

### B AI in Not-for-Profits: Governance, Data Policy, and Operational Efficiency

AI adoption is accelerating, but many organizations are still working through how to utilize it responsibly. Explore how to approach AI with clear governance and data considerations, along with practical use cases that improve efficiency without compromising mission integrity.

**Ray Beste** - Principal AI Strategist, Sikich

12:20PM - 1:00PM

### Networking Lunch

1:00PM - 1:50PM

General Session

### From Fear to Action: Practical AI for Not-for-Profits

Many professionals are interested in AI but are stuck at surface-level use. Cut through the hype to see where AI is delivering real value in not-for-profit accounting and finance and hear how to apply the appropriate guardrails to move from experimentation to more confident use.

**Moderator:**

**Ray Beste** - Principal AI Strategist, Sikich

**Panelists:**

**Zach Bernstein** - AI Consulting Lead, Crowe

**Jordan Fladell** - Partner, Technology Advisory Services, Aprio

**Alice Locatelli** - Chief Experience Officer, Society of Actuaries



### B Ethics and Fraud Risk in Politically Sensitive Environments

Understand how the Department of Justice's expanded domestic terrorism enforcement framework may impact tax-exempt organizations and their donors. Review the statutory authority under Section 501(p), including how tax-exempt status can be suspended. Plus, explore key legal risks and considerations for those operating in politically sensitive environments.

**Guinevere Moore, JD** - Managing Member, Moore Tax Law Group LLC

3:00PM - 3:50PM

Concurrent Sessions .....

### A Organizational Resilience: Staying Strong Through Change

Sustaining mission impact requires adapting to funding shifts, regulatory change, and evolving community needs. Explore practical approaches to leadership, resource management, and innovation to help your organization remain strong through uncertainty. Gain tools to assess vulnerabilities, engage stakeholders, and support long-term sustainability.

**Theresa Valade** - CEO, Success Trek

### B Sponsorship vs. Advertising: What to Know

Sponsorship and advertising arrangements can be easy to misclassify. Review common scenarios and how not-for-profit organizations should account for them.

**John Alfonso** - Partner, Not-for-Profit and Education Industry Leader, CohnReznick

**Franya Esquivel** - Assurance Director, Not-for-Profit & Education Industry, CohnReznick

4:00PM - 4:50PM

General Session

### Leadership, Resilience, and Innovation in Times of Change



Session details coming soon.

**Nassim Abdi, Ph.D.** - CEO/Co-Founder, STORYBOLT

2:00PM - 2:50PM

Concurrent Sessions .....

### A Debt Refinancing 101

Demystify the strategic, financial, and accounting dimensions of refinancing in the not-for-profit world. Understand when refinancing makes sense, how it's accounted for under ASC 470, and the disclosures that are required. Plus, discuss real-world case studies that highlight both successful outcomes and cautionary tales.

**Laura Hanssel, CPA** - Chief Financial Officer, Harris Theater for Music and Dance

**Lanita Higgs-Jackson, MBA** - Chief Financial Officer, Pillars Community Health

**Lindsay Wall, MPP** - Managing Director and Partner, Longhouse Capital Advisors

**Dianne Wasieleski** - Partner, Grant Thornton



4:50PM - 5:30PM

### NETWORKING RECEPTEN

(Don't forget to add to your registration.)

Stay after to connect with colleagues and speakers. Light bites and refreshments will be provided.



# The NFP Reporting Playbook

Invest one morning now and save time later: reduce rework, prevent misclassifications, and improve clarity for financial statement users.

## June 5, 2026 Virtual Half-Day Agenda

8:25<sup>AM</sup> - 8:30<sup>AM</sup>

### Welcome Remarks

8:30<sup>AM</sup> - 9:20<sup>AM</sup>

### Contributions 101: Understanding the ASC 958 Model

Take a focused look at the ASC 958 core contribution model, including conditional vs. unconditional contributions, pledges, donated goods and services, and common scenarios like auctions and raffles. Review key journal entries and audit considerations to support accurate recognition, reporting, and compliance.

**Jennifer Casacchia, CPA** - Director, Sikich

9:30<sup>AM</sup> - 10:20<sup>AM</sup>

### Restrictions and Net Assets

Gain a practical overview of net asset classifications, including time and purpose restrictions, and how to properly record releases from restrictions. Review underwater endowments and common classification pitfalls. Understand the mechanics behind net asset reporting and how to prevent errors.

**Sarah Eddy, CPA** - Practice Leader, Audit & Assurance, Mann Weitz & Associates LLC

10:30<sup>AM</sup> - 11:20<sup>AM</sup>

### Financial Statement Presentation and Disclosures

Examine GAAP requirements for not-for-profit financial statements. Review net asset disclosures, liquidity and availability, and donor restrictions. Explore common “no net” presentation issues, revenue disaggregation, and key disclosure considerations to improve clarity for financial statement users.

**Joshua Bream, CPA** - Director, Porte Brown LLC

11:30<sup>AM</sup> - 12:30<sup>PM</sup>

### Translating Accounting Into Form 990

Connect financial statement treatment to Form 990 reporting, including what Schedule A measures and how to switch between Part II and Part III. Through practical examples, explore common pitfalls, unusual grant scenarios, private vs. public foundation distinctions, and options when an organization fails the public support test.

**Jessica Toader, CPA, MST** - Tax Principal, Plante Moran

### Separate Registration Required

**Credits:** 4 CPE | **Cost:** \$300 M | \$385 NM | [www.icpas.org/nfps](http://www.icpas.org/nfps)

## Thank You to Our Content Advisory Group Volunteers

### Not-for-Profit Symposium:

**Jon Assell, CPA** | Griffin Museum of Science and Industry

**Kimberly Marshall, CPA** | Forvis Mazars LLP

**George Persekian** | Wipfli Advisory LLC

**Marcy Steindler, CPA** | Mann Weitz & Associates

**Jessica West, CPA** | Aprio Advisory Group LLC

**Bernadette Zita, CPA** | College of Healthcare Information Management Executives

### Not-for-Profit Virtual Half-Day Conference:

**Megan Angle, CPA** | Porte Brown LLC

**Jennifer Casacchia, CPA** | Sikich

**Monica Funk, CPA** | Ann & Robert H. Lurie Children's Hospital of Chicago

**Nancy Gonsiorek, CPA** | Nancy L. Gonsiorek, CPA

**Susan Greggo, CPA** | Warady & Davis LLP

**Aleks Kondratyev, CPA** | Academy of Nutrition and Dietetics