

About this Session

NEW RULES FOR COMPLIANT FUNDRAISING

“New federal and state regulations, combined with changes in public expectations, have created a much more demanding environment that not-for-profit organizations must operate within.”

– Gordon Siess

This workshop will address compliant fundraising for non-profit organizations. Attendees will obtain the latest information on:

- the new 990 tax requirements,
- the relationships between vendors and agencies,
- gift policies, and
- conflicts of interest.

Who Should Attend

- ◆ Administrators
- ◆ Board Members
- ◆ Corporate Compliance Officers
- ◆ Development Professionals
- ◆ Quality Assurance Directors

CP of NYS TRAINING SERIES Upcoming Sessions

January 13, 2009

New Rules for Compliant Fundraising
Albany

March 6, 2009

Challenging Behavior in Children and Adults with Autism Spectrum Disorders: Advances in Understanding and Treatment
Albany

April 2, 2009

A Family-Centered, Functional, Trans-Disciplinary Model for Early Intervention
Albany

April 28, 29 & 30, 2009

Supervisory & Leadership Training
Albany, Syracuse, NYC

May 5, 2009

Audits, Investigations & Self Disclosures – 2nd Annual Corporate Compliance Conference for Providers Serving Individuals with Disabilities
Albany

Further details available at
www.cpodnys.org

Cerebral Palsy Associations
of New York State



CP of NYS Training Series

NEW RULES FOR COMPLIANT FUNDRAISING

January 13, 2009

Presented by

Gordon M. Siess &
Beatrix G. McKane
Albany, NY

CEREBRAL PALSY ASSNS. OF NYS
90 State Street, Suite 929
Albany, NY 12207

Session runs from
10:30 a.m. to 2:00 p.m.

ABOUT THE SPEAKERS

Gordon M. Siess, CPA – Partner

Mr. Siess is the Partner in Charge of the Not-For-Profit division of Holtz Rubenstein Reminick LLP. In addition, he serves on the firm's Executive Committee. He has over 20 years of experience in public accounting providing accounting, auditing and consulting services to clients in the not-for-profit, education, long-term care and health care industries. His experience covers all aspects of financial accounting, consultation, and auditing services, including compliance with regulatory accounting and disclosure matters.

Mr. Siess has also assisted clients with developing cost allocation methodologies and preparing Medicaid, Medicare and New York State Education Department rate appeals, regulatory cost reporting requirements, financial projections and financial feasibility studies. He has also performed operational reviews and accounting systems design for not-for-profit and health care providers, as well as cost finding studies and the analysis of managed care contracts.

Professional Activities

Mr. Siess is a member of the American Institute of CPAs. He is a member of the Health Care Committee of the New York State Society of CPAs ("NYSSCPA"), the former Chairman of the Suffolk chapter's Not-For-Profit Committee and a member of the Nassau Chapter's Medical and Other Professionals Committee. Mr. Siess earned a B.B.A. degree in accounting from Hofstra University.

Beatrix G. McKane, CPA

Ms. McKane is an Audit Partner in the Not-For-Profit and Health Care Services divisions of Holtz Rubenstein Reminick LLP. She possesses a diverse background in the not-for-profit sector. She provides audit and consulting services to clients in health care, mental health, substance abuse treatment and disabilities programs, and is responsible for compliance audits in accordance with Governmental Auditing Standards. As a former CFO for two health care organizations, she was responsible for their financial affairs, including such "back office" operations as claims processing, billing, enrollment and collections, management information systems, and related accounting and budgeting activities.

Professional Activities

Ms. McKane is the past president of the Executive Board of the Suffolk chapter of the New York State Society of CPAs ("NYSSCPA"). Currently she is a Board member of the statewide NYSSCPA and serves as a member of the American Institute of CPAs. She has lectured extensively to accounting professionals and the general public on current issues in not-for-profit accounting. Further, she has been appointed to several ad hoc committees of the NYSSCPA, the Liaison Committee to the IRS Exempt Organization Northeast Region division, and the Committee which developed the first CFR Audit Guidelines Manual for New York State. Ms. McKane earned a B.A. degree in history from C.W. Post College and an M.S. degree in accounting from Long Island University.

REGISTRATION FORM

Check the appropriate type of registration. **IMPORTANT:** This form will be used to produce your name badge. Please PRINT clearly and accurately. Registration fee includes lunch. Please indicate any special meal requirements or Assistive Aids or Services required on a separate sheet of paper.

- CP of NYS Affiliate: \$50.00**
- Non-Affiliate: \$60.00**

First Attendee

Name: _____

Title: _____

Agency: _____

Address: _____

Phone: _____ Fax: _____

E-Mail: _____

Additional Attendee

Name: _____

Title: _____

Agency: _____

Address: _____

Phone: _____ Fax: _____

E-Mail: _____

TOTAL AMOUNT ENCLOSED: \$ _____

Return form and check (made payable to):

CP of NYS – 90 State Street, Suite 929, Albany, NY 12207

If you have any registration questions, please call us at (518) 436-0178.

Cancellation Policy:

CP of NYS will refund the full registration fee to you if cancellation is made 5 days prior to the session start date. After that day, a refund will be made less a \$20 administrative fee. "No Shows" will not be refunded their registration fee.