

# 24th Annual Nonprofit Law Conference 2023

*Creativity and complexity in funding charitable activities, and noteworthy developments in exempt organization law*

This year's *Conference* explores the many ways in which charitable activities may be funded, factoring in philanthropic and organizational perspectives, and practical and legal considerations. Speakers share their expertise and experience from the general counsel's office of leading nonprofits, nonprofit grant-making institutions and consulting companies, the Office of the Attorney General's Division of Nonprofit Organizations/Public Charities Division, and as nonprofit and tax practitioners. Join the dialogue; bring your questions!

## Agenda

- **Year in Review**
  - What do nonprofits and nonprofit practitioners need to know about key legal developments in the past year?
- **Funding a New Project: How to Compare the Options**
  - What happens when donors or nonprofit organizations want to fund an independent charitable endeavor or program, and setting up a new, publicly supported 501(c)(3) is not feasible? What are the alternatives? What are the tax, public charity, and practical considerations?
- **Collaborative Funding Arrangements**
  - Donees are combining resources in new and inventive ways to achieve common goals more efficiently and effectively. What can we learn from them? What are the legal implications?
- **Donations of Complex and Unusual Assets**
  - What do donors and donees need to consider when the donation of a complex or unusual asset is proposed? Examples include stock, private business interests, art and other collections, cryptocurrency, IRA and other retirement funds, and real estate.
- **Federal and State Grants: Costs and Considerations**
  - What do charities that seek or accept federal or state grants need to know about compliance and liability exposure?
- **Restricted Gifts: Risks and Responsibilities**
  - What do charities need to know about restricted gifts? Join us for a discussion regarding fundraising campaigns, compliance with restrictions, and the impact on a charity's financing.

## Faculty

Anita S. Lichtblau, Esq., *Casner & Edwards LLP, Boston*, Cochair; Elka T. Sachs, Esq., *Krokidas & Bluestein LLP, Boston*, Cochair; Eric B. Carriker, Esq., *Office of Attorney General/Nonprofit, Organizations/Public Charities Division, Commonwealth of Massachusetts*; Eleanor A. Evans, Esq., *Hemenway & Barnes LLP, Boston*; Akiyo Fujii, Esq., *Tufts University, Medford*; Kate Guedj, *Senior Vice President and Chief Philanthropy Officer, The Boston Foundation, Inc., Boston*; Sharon Cramer Lincoln, Esq., *Casner & Edwards LLP, Boston*; Allison Ma'luf, *Executive Director and General Counsel, Community Action Program Legal Services, Inc., Boston*; Melissa Sampson McMorrow, Esq., *Nutter McClennen & Fish LLP, Boston*; Harrison (Colby) Rogers, Esq., *Ropes & Gray LLP, Boston*; Jay D. Rosenbaum, Esq., *Nixon Peabody LLP, Boston*; A.L. Spitzer, Esq., *Massachusetts Institute of Technology, Cambridge*



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## Dates & Locations

Register at [www.mcle.org](http://www.mcle.org)

### BOSTON

Wednesday, May 3, 2023  
9:30 am–3:30 pm  
MCLE Conference Center  
10 Winter Place, via Winter Street  
Program Number: 2230108P01

### LIVE WEBCAST

Wednesday, May 3, 2023  
9:30 am–3:30 pm  
Program Number: 2230108WBC

### REBROADCAST

Thursday, May 18, 2023  
9:30 am–3:30 pm  
Program Number: 2230108RBC

### REBROADCAST

Friday, May 26, 2023  
9:30 am–3:30 pm  
Program Number: 2230108RB1

### ON DEMAND WEBCAST

View after Friday, May 26, 2023  
Program Number: 2230108WBA

## Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Sponsor Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

## Materials

The materials for this program include MCLE's *Massachusetts Nonprofit Organizations*, which, along with any other materials, can be downloaded via the link emailed to you upon registration.

Also, there is no need to take extensive notes. Two weeks after the live webcast, all registrants receive a link to a verbatim transcript and audio and videorecordings of this program.

## CLE Credits

Earn up to 5 CLE credits