

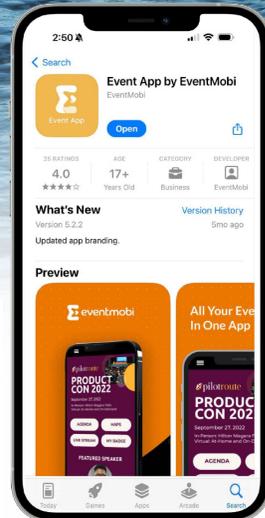
2025

NONPROFIT SYMPOSIUM

POWERED BY gwscpa

Download the Nonprofit Symposium Event App
Find 'Event app by EventMobi' in App store or Google Play
Search for: "GWSCPA2025"
Enter the email address you used to register for Symposium
No password needed

Note: use either Free Convention Center WiFi or your own mobile carrier
FIRST AID & MOTHER'S LOUNGE: Room 101
COAT CHECK: Salon F (behind FedEx)



TUESDAY SALON A/B/C ROOM 102 ROOM 103 ROOM 207

7:00-8:00 AM CONTINENTAL BREAKFAST AVAILABLE

8:00-8:10 AM **Opening Welcome**
Omid Mohebbi, Symposium Chair

8:10-9:00 AM **FASB Update**
Jeffrey Mechanick

20 MINUTE BREAK

9:20-10:10 AM **Navigating The Gray: A Financial Transparency Panel**
Kelly Metz, Bruce Friedman, Rosie Henderson, Ty Johnson

Stronger Together: The Power of an Engaged Board
Heather Johnson, Sara Boehm

Retirement Plan Compliance - What You Don't Know Can Hurt You
Paul Phelan, Dan Fox, David Rosner, Chris Persak

Click Happens: Surviving The Cyber Threats You Didn't See Coming
Ryan Peasley

15 MINUTE BREAK

10:25-11:40 AM **Advanced Automation Techniques Using RPA & AI**
Megan Riley, Karl Spanbauer

Cracking The Code: Deciphering Contributions & Exchange Transactions Under 958-605 & ASC 606
Will Donahue

Tax Update & Protecting Your Exemption - 501(c)(3) & 501(c)(6) Organizations
Todd Teresco, Jake Cook

Panel Discussion: Financial Leadership in Motion: Staying Grounded Amid Disruption
Leslie Zeid, Janice Stucke, Jessica McClain

LUNCH 95 MINUTES

1:15-2:05 PM **Internal Controls & Fraud Risks for Nonprofits**
Neely Duncan, Tamara Vineyard

Form 990: Key Areas & Frequently Asked Questions
Fred Longwood

Prepared, Not Panicked: A Guide for Nonprofits Facing Market Volatility
Dennis Gogarty, Mark Murphy

Unlocking Collaboration: Best Practices for Nonprofit Finance & Fundraising Teams
Jason Sturdevant, Blakely Richard, Stephanie Isham

15 MINUTE BREAK

2:20-3:10 PM **Evolving Best Practices in Nonprofit Reporting & Transparency**
Lindsay Dean, Max Manley

Accounting Policy Creation - A Journey To Success!
Trish Johnson, Deborah Moore

How to Develop An Effective, Risk-Aware Contracting Process
Doug Horner

AI for Impact: No-Code Solutions To Empower Nonprofits
Jim Blackwell

10 MINUTE BREAK

3:20-4:35 PM **Avoiding Dysfunctional Expenses- Expense Allocation & Joint Costs for Nonprofit Organizations**
Will Donahue, Karl Spanbauer

Breaking The Silos: Uniting AI, Data Strategy & Cybersecurity for Scalable Impact
Anne Balduzzi

Improving Financial Communications with Boards During Unpredictable Times
Paul Preziotti, Mike Gellman

Ask The Nonprofit Attorney
Jeff Tenenbaum

10 MINUTE BREAK

4:45-5:35 PM **Adapting for Impact: Resilience in Action**
Panel: Adnan Bokhari, Christine Orr, Divya Gadre, Erin Hogan

5:35-7:00 PM RECEPTION

WEDNESDAY**SALON C****ROOM 102****ROOM 103****ROOM 207****7:15-8:00 AM CONTINENTAL BREAKFAST****8:00-8:50 AM****Budgeting From
The Bottom-Up**
David Doher**From Passion To Paycheck:
Aligning Your Mission With
Competitive Hiring
Practices**
Allison Law, Brittney Gordon**The Tax Bill Unpacked -
Navigating Tax Changes for
Exempt Organizations:
Year-End Review &
2026 Insights**
Ray Ly, David Stark**Avoiding Audit
Findings: Mastering
Grant Compliance &
Control Requirements**
Samantha Bement,
Stephanie Zientak**20 MINUTE BREAK****9:10-10:00 AM****Economic Outlook Under
The New Administration:
Implications for Strategic
Financial Leadership**
Jason Pride**Hot Issues in
Employment Law**
Jeff Pargament**Are Your Internal Controls
"SAS 145" Proof? A Spotlight
On The COSO Model**
Jim Kanuch, Amanda Smith**From Patchwork to
Powerhouse: How
Associations Can
Strategically Upgrade
Technology Without
Losing Their Mission**
Andy Potasek, Will Davis,
Michelle Wroblewski**15 MINUTE BREAK****10:15-11:30 AM****"Here Today...Gone
Tomorrow" Stay Relevant- Be
Strategic & Assess Risks &
Opportunities**
Christian Spencer,
Rob Dickinson**Rethinking Indirect
Cost Recovery**
Robbie Vanrijkel**The "Donorverse" Assembles:
Philanthropy Experts Decode
2025 Giving & Changing
Nonprofit Tax Landscape**
George Burnette, Robert Williams,
Amanda Centers, Joanna Friedman**Cybersecurity For
Non-Profits, Defending
In The Digital Age**
David Scaffido,
Julien Decosimo**LUNCH 90 MINUTES****1:00-2:15 PM****Panel Discussion: Building
A Nonprofit Finance Team
For Growth
& Mission Impact**
Mark Goldstein,
Kevin Gerrity, Brian Bender,
Kara Onorato, Alison Roca**The 2025 Workforce Storm:
Analyzing The Conditions,
Predicting The Forecast &
Planning For The Next
Downpour From Both Sides
Of The Table**
Evan Seward, Sam McCarthy**Ask The Tax Experts:
Real-Time Insights on EO Tax
Challenges**
Lisa Heller, Laura Kalick,
Mike Sorrells, Calvin Marks**Understanding The
Audit - What Does Your
Auditor Really Care
About?**
Doug Boedeker**15 MINUTE BREAK****2:30-3:20 PM****Rethinking Reserves:
How Much is Too Much?**
Ann Marie Etergino,
Craig Silverio, Trey Blanchard,
Matt Paragamian**Strategic Shifts: Mergers,
Partnerships & Financial Moves
Reshaping Nonprofit
Sustainability**
Karen Livingston, Nike Ajao**Nationwide Charitable
Solicitation
Registrations: Fact vs.
Fiction**
Ron Barrett**AI For The Finance &
Accounting Careers
In The Future**
Rosye Cloud,
Douglas Palmer,
Lauren Hough**10 MINUTE BREAK****3:30-4:20 PM****Sales Tax for Nonprofits -
Not Everything is Exempt**
Melissa J-L Myers**What is The Digital CFO for
Today's Nonprofit?**
Buu-Linh Tran, Beth Larsen**The Healthy Accountant: Is
Your Lifestyle Your Most
Valuable Asset
Or Biggest Liability**
Jill Myers**Single Audit Update**
Rachel Foster,
Shavree Washington**10 MINUTE BREAK****4:30-5:20 PM****Debt Refinancing 101:
What Nonprofit
Organizations Need to
Know**
Rosie Henderson,
Brian Morgan**Powering Through The Silver
Tsunami: Strategic Succession
Planning for Nonprofits**
Kendra Janevski**Scenario Planning for
Nonprofits: Building
Resilience & Sustaining
Impact**
Harriet Cutshall

2025

NONPROFIT SYMPOSIUM

POWERED BY gwscpa