

Transformed from Within

**Register by
August 31, 2011 to
save \$\$\$ for your
organization.**



Fifth Annual 2011 Ultimate Financial and Legal Conference™ For Churches, Ministries, and Faith-Based Organizations

Presented By
Faith & Philanthropy Institute
in collaboration with
Sommerville & Associates, P.C.
Ratliff & Associates, P.C. and
Weycer, Kaplan, Pulaski, and Zuber, P.C.

October 24-25, 2011
Mediterranean Villa
1111 Wet N Wild Way
Arlington, Texas 76011

Ultimate Financial and Legal Conference™

- How can you get the most of the limited resources available to you?
- How can you take the guesswork out of hiring the right person the first time?
- When is a volunteer considered an employee?
- How can you ensure your Board is poised to provide the direction and support your organization needs?
- What are the latest tax and legal matters facing churches and other faith-based organizations?

These are just a few of the questions that will be answered at the **2011 Ultimate Financial and Legal Conference™**.

Churches, ministries, and faith-based organizations often focus externally on improving the lives of the people they serve. **Ultimate Financial and Legal Conference™** is a unique program designed to strengthen ministry leaders to transform their organizations internally by addressing financial, legal, human resources, and risk management topics.

Providing best practices and solutions to issues facing local church pastors, Christian nonprofit leaders, and financial administrators, this conference focuses on equipping ministry leaders to become role models in financial accountability and faithful stewardship.

Register today to transform your organization from within.

Schedule At-a-Glance

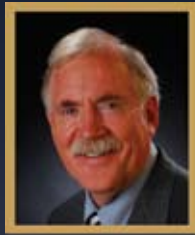
Monday, October 24th

- | | |
|--------------------|------------------------------------|
| 8:00 - 9:00 a.m. | Registration/Continental Breakfast |
| 9:00 - 9:30 a.m. | Opening Devotional |
| 9:30 - 10:45 a.m. | General Session |
| 10:45 - 11:00 a.m. | Break |
| 11:00 - 12:15 p.m. | Concurrent Sessions |
| 12:15 - 1:45 p.m. | Lunch Session |
| 1:45 - 2:00 p.m. | Announcements |
| 2:00 - 4:30 p.m. | General Session |
| 6:30 p.m. | Dinner and Live Theatre |

Tuesday, October 25th

- | | |
|--------------------|-----------------------|
| 8:30 - 9:00 a.m. | Continental Breakfast |
| 9:00 - 9:15 a.m. | Announcements |
| 9:15 - 10:30 a.m. | General Session |
| 10:30 - 10:45 a.m. | Break |
| 10:45 - 12:00 p.m. | General Session |
| 12:00 - 1:00 p.m. | Networking Lunch |
| 1:00 - 1:15 p.m. | Announcements |
| 1:15 - 2:30 p.m. | Concurrent Sessions |
| 2:30 - 2:45 p.m. | Break |
| 2:45 - 4:00 p.m. | General Session |
| 4:00 - 4:15 p.m. | Break |
| 4:15 - 5:30 p.m. | Optional Session |

General Session Speakers



Dan Bolin
International Director,
Christian Camping International



Bill Brown
WNB Consulting, LLC



Cory Halliburton
JD, Weycer, Kaplan, Pulaski, & Zuber, P.C.



Patti Malott
Upright Ministries



Elaine Sommerville
CPA, Sommerville & Associates, P.C.



Frank Sommerville
JD, CPA, Weycer, Kaplan, Pulaski, & Zuber, P.C.

Conference Presenters



Sherrye Willis
MBA, Faith & Philanthropy
Institute



Rick Dunham
Dunham+Company



Jim Mittan
CPA, Covenant Church



Ashley Voss
CPA, Ratliff & Associates, P.C.



Special Evening of Dinner and Live Theatre

at *Mediterranean Villa*.

Monday, October 24, 2011, 6:30 p.m.

Advanced Reservation Required - \$50

Subject to cancellation due to lack of participation

Day 1: Monday, October 24, 2011

8:00 – 9:00 a.m. – Registration, Continental Breakfast

9:00 – 9:30 a.m. – Opening Devotional & Announcements

Mark Matlock, WisdomWorks Ministries

9:30 – 10:45 a.m. – General Session: Governance Best Practices

Dan Bolin, Christian Camping International

The better your Board, the better your ministry. Learn practical ways a Board can grow and improve to provide the strength, support, and direction a ministry needs to fulfill its God-given mission.

10:45 – 11:00 a.m. – Break

11:00 – 12:15 p.m. – Concurrent Sessions:

Budgeting

Jim Mittan, CPA, Covenant Church

During these uncertain economic times, you must take necessary steps during the budgeting process to ensure your ministry is maximizing available resources and creating a plan for appropriate cash flow needs. Staying true to the vision, assessing the validity and scope of each ministry area, and making difficult decisions regarding programs and personnel are all ingredients of the budgeting process.

The Interview Process: Asking the Right Questions and Hiring the Best People

Patti Malott, Upright Ministries

Your employees are some of your church's most important resources. If you don't hire the right person the first time, it can affect your entire organization. Learn the seven essential steps to take before conducting the interview; what you should search for in every résumé; how to ensure your hiring practices are in compliance with Title VII and the Civil Rights Act of 1964; the seven essentials of the interview; and the seven steps to take after the interview.

12:15 – 1:45 p.m. – Lunch Session: Discovering True Security in Turbulent Financial Times

Rick Dunham, Dunham+Company

The theologian Henry Nouwen asks, "What is the true base of our security?" Is it money? Or, is it God? This session will address how fiscal responsibility connects to faith and the Biblical view of funding God's Kingdom work.

1:45 – 2:00 p.m. – Announcements

2:00 – 4:30 p.m. – General Session: 2011 Tax & Legal Update

Elaine Sommerville, CPA, Sommerville & Associates, P.C.

Frank Sommerville, JD, CPA, Weycer, Kaplan, Pulaski, & Zuber, P.C.

Learn the up-to-date tax and legal changes affecting churches and ministries including—but not limited to—director and board liability, intermediate sanctions and compensation issues.

6:30 p.m. Dinner and Live Theatre

Who Should Attend?

Senior Pastors • Executive Pastors • Board Members
Church Leaders • CEO/Presidents • Chief Financial Officers • Accountants
Business and Church Administrators • Nonprofit Leaders • Seminary Students

Day 2: Tuesday, October 25, 2011

8:00 – 9:00 a.m. – Continental Breakfast

9:00 – 9:15 a.m. – Announcements

9:15 – 10:30 a.m. – General Session: Compensation: What is It?

Elaine Sommerville, CPA, Sommerville & Associates, P.C.

Frank Sommerville, JD, CPA, Weycer, Kaplan, Pulaski, & Zuber, P.C.

Compensation is more than determining annual salary or hourly wages. Learn the legal implications of creating a compensation package and the tax consequences to consider.

10:30 – 10:45 a.m. – Break

10:45 – 12:00 p.m. – General Session: Compensation: How and When to Use an Expert

Bill Brown, WNB Consulting, LLC

Patti Mallot, Upright Ministries

Take the mystery out of determining reasonable compensation. This interactive session will address the need for a compensation consultant; how to select a consultant; what to expect from the consultant; how to interact with a consultant; using the data and interpreting reports; what to do with observations and recommendations; and analyzing the cost vs. the benefit of a consultant.

12:00 – 1:00 p.m. – Networking Lunch

1:00 – 1:15 p.m. – Announcements

1:15 – 2:30 p.m. – Concurrent Sessions

When Vision is Greater than Budget

Sherrye Willis, MBA, Faith & Philanthropy Institute

Discover how to create new revenue streams through social entrepreneurship. Learn why the faith community should recommit to mission-based enterprises and examine successful models of faith-based social enterprising.

Audit & Review

Ashley Voss, CPA, Ratliff & Associates, P.C.

Examine the difference between audits, reviews, and compilations and the relative costs of each. Discover how to reduce the costs of audits, reviews, and compilations by participating in the PBC's (prepared by client), utilizing electronic transmissions, and advance preparation before the audit begins.

2:30 – 2:45 p.m. – Break

2:45 – 4:00 p.m. – General Session: Labor Law

Cory Halliburton, JD, Weycer, Kaplan, Pulaski, & Zuber, P.C.

Find out what you need to know about the revamped American with Disabilities Act and related EEOC regulations which were recently adopted. This session will include an overview of when volunteers are really employees and how to keep volunteers engaged while protecting the organization and others, and other trends in employment law.

4:00 – 4:15 p.m. – Break

4:15 – 5:30 p.m. – Optional Session: IRS Tax Form 990

Elaine Sommerville, CPA, Sommerville & Associates, P.C.

Stay in compliance with tax laws. Get the latest information on filing IRS Form 990.



Ultimate Financial and Legal Conference™

October 24-25, 2011

Mediterranean Villa
1111 Wet N Wild Way
Arlington, Texas 76011

CPE Credit:

Delivery Method: Group-live

Program Level: Beginner to Intermediate

Prerequisites: None

Advanced Preparation: None

CPE Credits: 13 (15 if attending Optional Session: IRS Tax Form 990)

Faith & Philanthropy Institute (FPI) is registered with the Texas State Board of Public Accountancy (TSBPA) as a continuing professional education provider. For more information, contact the TSBPA at 512-305-7800.

HOW TO REGISTER

Telephone: 817.835.0271

Toll-Free: 877.374.7300

Fax: 817.864.9006

Web: www.fpiweb.org

Email: info@fpiweb.org

HOTEL ACCOMMODATIONS

Holiday Inn

1311 Wet N Wild Way
Arlington, TX 76011

T: (817) 460-2500

F: (817) 460-2510

www.hiarlingtontx.com

Rate: \$115 available (October 23 - 25, 2010)

*Ask for UFL blocked rooms.

Reservations must be made by September 23, 2011 to receive the discounted rate

Hotel rooms are NOT included in the Ultimate Financial and Legal Conference registration fee.

Cancellation Policy: Cancellations must be received in writing 4 weeks prior to the start date of the conference. After September 26, 2011, all registrations including “no shows” are subject to the full conference fee. An organization may substitute one individual for another at any time prior to the start of the program.



REGISTRATION

Please register me for the Ultimate Financial and Legal Conference™, October 24-25, 2011

Individual Registration

- \$215 (if received by 8-31-11) \$250 (if received on or after 9-01-11) \$200 (anytime, for FPI Members)

Send a team and Save!

TEAM DISCOUNTS: Please register my team for the Ultimate Financial and Legal Conference™
2 or more (Select One)

- \$195 (per person 8-31-11) \$235 (if received on or after 9-01-11) \$190 (anytime, for FPI Members)

Dinner and Live Theatre

I/we will attend the **Monday night Special Evening of Dinner and Live Theatre (Optional)**

- \$50 (per person)

TOTAL REGISTRATION: \$ _____

Please photocopy this form for additional individuals and team members.

Name _____ Title _____

Church/Organization _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Email _____

I would like to sign up for the following concurrent sessions (select one for each date):

Monday, October 24, 2011

- Budgeting
 The Interview Process: Asking the Right Questions and Hiring the Best People

Tuesday, October 25, 2011

- When Vision is Greater Than the Budget
 Audit & Review

- I plan to attend the optional 990 session on Tuesday.

Payment Method:

- Check is enclosed for \$ _____.

Please make checks payable to FPI and remit to FPI, Attn: UFLC, 400 Fuller Wiser, Suite 124, Euless, TX 76039

- Credit Card payment \$ _____ Visa MasterCard

Card Number _____ Expiration _____

Name on Card _____ Signature _____

Attire: The dress code for all conference-related activities is business casual. Dressing in layers is recommended as meeting rooms can be cool.

Model Release: For promotional purposes, videos and photographs are taken at conference. Your registration constitutes permission for FPI to use your likeness in promotional materials.



400 Fuller Wiser, Suite 124
Euless, TX 76039

RETURN SERVICE REQUESTED

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