

A graphic featuring two red hands holding a large, upward-pointing arrow. The arrow is white with a yellow-to-orange gradient. Behind the arrow is a bright yellow sunburst or flower-like pattern. The entire scene is set against a background of orange and yellow gradients.

# ACCELERATE EXCELLENCE

## 12th Annual Ultimate Financial & Legal Conference™

Presented by  
Alliance for Greater Works™  
In collaboration with  
Sommerville & Associates, P.C.,  
Ratliff & Associates, P.C.,  
and Weycer, Kaplan, Pulaski,  
& Zuber, P.C.

## 2018 Ultimate Financial and Legal Conference™

Join us October 22-23 at the **12th Annual Ultimate Financial and Legal Conference™!**

This premiere conference provides ministry leaders with up-to-date financial, legal, fundraising, talent management, and risk management best practices.

The 2018 program will specifically assist you in accelerating your ministry's mission impact with excellence.

Sessions will address topics including:

- Compensation and Fringe Benefits
- Unrelated Business Income Tax
- Employment Law Updates
- Revenue Recognition
- Social Media
- The latest tax and legal matters facing churches and faith-based organizations
- And much more!!

Our conference presenters are experienced subject matter experts bringing solutions to issues facing local churches, Christian nonprofit leaders, financial administrators, and resource development staff.

Register today to accelerate excellence in your church, ministry or nonprofit!

Texas CPE Credits: 13 hours (14 hours for those attending the optional Form 990 session)

CFRE Credits: 11 hours

**REGISTER TODAY @ [www.allianceforgreaterworks.org](http://www.allianceforgreaterworks.org)**

# 2018

## Ultimate Financial and Legal Conference™ AGENDA

### Monday, October 22

8:00 – 9:00 a.m.	Registration/ Continental Breakfast
8:45 – 9:00 a.m.	Announcements/Devotional
9:00 – 10:00 a.m.	General Session
10:05 – 11:05 a.m.	General Session
11:05 – 11:15 a.m.	Break
11:15 – 12:30 p.m.	Concurrent Sessions
12:30 – 1:30 p.m.	Networking Lunch
1:30 – 2:45 p.m.	Concurrent Sessions
2:45 – 3:00 p.m.	Break
3:00 – 4:15 p.m.	Concurrent Sessions
4:30 -5:30 p.m.	Optional: Form 990 Session
6:30 p.m.	Optional: Mystery Dinner

### Tuesday, October 23

8:00 – 9:00 a.m.	Registration/Continental Breakfast
8:30 – 8:45 a.m.	Announcements
8:45 – 9:10 a.m.	Devotional
9:15 – 10:30 a.m.	Concurrent Sessions
10:30 – 10:45 a.m.	Break
10:45 – 12:00 p.m.	General Session
12:00 – 1:15 p.m.	Networking Lunch
1:15 – 2:30 p.m.	Concurrent Sessions
2:30 – 2:45 p.m.	Break
2:45 – 4:00 p.m.	General Session

### HOW TO REGISTER

Telephone: 817.835.0271

Fax: 817.864.9006

Web: [www.allianceforgreaterworks.org](http://www.allianceforgreaterworks.org)

Email: [admin@allianceforgreaterworks.org](mailto:admin@allianceforgreaterworks.org) to submit questions

# Day 1: Monday, *October 22, 2018*

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

8:45 – 9:00 a.m. – Opening and Announcements

9:00 – 10:00 a.m. – General Session

## How Excellence Within Produces Excellence Outwardly

Jeff Ward

This session will strengthen your leadership impact with an uplifting exposition to remind us that our inner growth is the key ingredient to outer excellence.



Jeff Ward  
Director of  
External Focus  
Watermark Church

## 10:05 – 11:05 a.m. – GENERAL SESSION

### Redefining the Sacred-Secular Divide

Curt Swindoll

Debbie Swindoll

Are we in business or in ministry? Or in the business of ministry? Or perhaps the tension is entirely different – not spiritual versus business, but secular versus spiritual. When God calls to us to live “spiritually” does that mean living for Him, under Him, or WITH Him...regardless of our vocation?

So how do our spiritual lives deeply integrate in and through everything we do? How can we work and serve, not only with a greater awareness of God’s presence in our lives, but with a discerning process that looks for what God is doing in this world and how He is inviting us to participate with Him? This keynote session speaks to three dimensions of spiritual integration. We begin with a moral compass, and may move towards becoming overtly Christian. But how can we experience true freedom that only comes from being completely dependent on God?



Curt Swindoll  
President and  
Executive Counsel  
Grafted Life Ministries



Debbie Swindoll  
President and  
Executive Director  
Grafted Life Ministries



11:05 – 11:15 a.m. – Break

11:15 – 12:30 p.m. – CONCURRENT SESSIONS

### Foundations of Unrelated Business Income

David Trimner

Understand the basic history and elements of unrelated business income. Using a variety of examples, this session examines what constitutes a trade or business, regularly carried on, not substantially related to the exempt purpose. It also covers numerous exceptions and exclusions.

### A New (and Improved?) Financial Statements

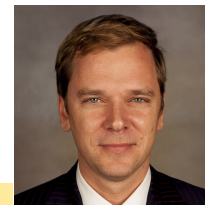
Ashley Voss

We'll take one last look at the new financial statement presentation requirements for nonprofits that become effective this year (ASU 2016-14). Special attention will be given to practical applications; examples and templates that you can use to make sure your financial reports are ready before the auditor arrives!

### More Than Money: The Spirituality of Fundraising

Dr. Jinneh Dyson-Williams

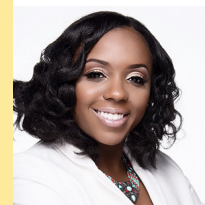
Transformational fundraising is about growing the heart of the giver to invest in God's Kingdom work. By the end of this session, attendees will: (1) understand the principles of Christian fundraising, and (2) discover common fundraising mistakes and how to correct them.



David Trimner, CPA,  
Principal  
National Nonprofit  
Tax Leader MST  
CliftonLarsonAllen LLP



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



Dr. Jinneh Dyson-Williams  
Managing Director  
Alliance  
for Greater Works™

*"I have attended the Ultimate Financial and Legal Conference consecutively for several years now and consider it my 'must go-to' event every year. The cadre of presenters, year in and year out, is excellent! I stopped wondering if each year's keynote speaker could equal or surpass previous years speakers—because they do! I learn more from the various sessions and networking at UFLC than I do at any other event."*

*~ 2017 UFLC attendee*

12:30 – 1:30 p.m. – Networking Lunch

1:30 – 2:45 p.m. – CONCURRENT SESSIONS

**Committing Your Work to the Lord:  
Employment Law Update and Ever-Present  
Labor Challenges**

Cory Halliburton & Frank Sommerville

Join our favorite attorneys to review current events affecting a religious organization's employment practices including the application of the ministerial exception and strategies for nonexempt employees regarding overtime rules and compensable time. As they explore these popular topics, learn how your organization can navigate areas that can side track its ministry and drain valuable resources when things go awry.

**Facing the Challenge from the New Revenue  
Standards**

Kimberly DeWoody & Charlie Kennimer

Do you have contracts with customers? Contributions? Grants? Discuss the implementation and potential impacts of FASB's new (and proposed) revenue recognition standards for nonprofit organizations. The new standards replace almost all current revenue guidance, enhance disclosures, and require, in some cases, significant judgment. Walk through the application of the five-step model and discuss how an organization can start (or continue) the analysis towards implementation elements of a winning grant.



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



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



Kimberly DeWoody, CPA  
Partner  
Whitley Penn

2:45 – 3:00 p.m. – Break

3:00 – 4:15 p.m. – GENERAL SESSION

4:30 – 5:30 p.m. – OPTIONAL

**Tax Update for Religious Organizations**

Elaine Sommerville and Frank Sommerville

New tax law, new guidance, new rulings and new court cases all provide insight into the application of the rules and regulations applicable to religious organizations. Learn what is new from the IRS and how to apply lessons learned by others to the day to day operations of your religious organization.

**Optional 990 Form Session**

Elaine Sommerville  
Compensation Reporting – From Form 990  
Part VII to Schedule J

Inaccurate compensation reporting on Form 990 can attract negative attention from the IRS and the public resulting in burdensome costs, loss of donations and/or bad publicity for an organization. This session explores the intricacies of compensation reporting on the Form 990 and avoids common errors resulting in unwanted consequences.



Charlie Kennimer, CPA  
Senior Manager  
Whitley Penn



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

6:30 p.m. – OPTIONAL: Mystery Dinner

# Day 2: Tuesday, October 23, 2018

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

8:30 – 8:45 a.m. – Announcements

8:45 – 9:10 a.m. – Devotional by Dr. Jinneh Dyson-Williams

9:15 – 10:30 a.m. – CONCURRENT SESSIONS

## Operating Abroad – Avoiding the Pitfalls of Foreign Mission Activities

Elaine Sommerville  
Frank Sommerville

The world seems to grow a little smaller everyday, and operating in foreign countries is quickly becoming a normal part of any religious organization's operations. Operating without knowledge of potential restrictions from the U.S. or a foreign country can create complications for a religious organization and be detrimental to successful ministry. From accepting donations to paying for mission expenses, learn how to anticipate and plan for common restrictions and how to build a solid foundation for operating both short-term and long-term foreign missions.

## High Level Ministry Issues Vonna Laue

There are factors outside the day-to-day operational activities that impact how ministry is done. Washington DC produces legislation, regulation, and legal implications that leaders must be aware of. In addition, it's critical for governing boards to function in a healthy manner for organizations to fulfill the purpose for which they exist.

In this session, we will discuss recent developments on Capitol Hill and the impact on your organization. We will also address key governance issues that your board can use to evaluate its performance.

## Administration and Ministry: Bridging the Gap

Patti Malott  
CJ Malott

With a combination of over 60 years serving churches as a Pastor and Business Administrator, Patti and C.J. Malott provide ways to fuel your ministry and bridge the gap between pastoral and administrative staff. Attendees will learn practical ways to communicate, influence, and obtain cohesiveness in teams, while keeping them legal and safe. Come and hear the different views of this mother and son duo as they share their experiences.



Dr. Jinneh Dyson-Williams  
Managing Director  
Alliance  
for Greater Works™



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

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



Vonna Laue  
Executive  
Vice President  
ECFA



Patti Malott  
President,  
Upright Ministries



CJ Malott  
Director of Operations  
Church CO+OP

10:30 – 10:45 a.m. – Break

10:45 – 12:00 p.m. – CONCURRENT SESSIONS

### Essentials of IT Security

Nick Nicholaou  
Jonathan Smith

It's easy for a church to have a data breach and end up in the news! What should leadership know to prepare for a breach or better yet, prevent one? Come and learn the importance of

- Firewalls
- Wi-Fi
- Passwords & Passphrases
- Email Vulnerabilities
- Malware (including Ransom ware)
- Macs
- Mobile Devices
- Training Your Team to provide protection to your church and its data.

### Social Media and Congregations

Phill Martin

Chances are your church is using social media whether you know it or not. This workshop will look at the issues around social media and the church from an administrative leader's perspective. Data from a recent administrative survey will be shared. Come prepared to hear and tell stories about this frontier for congregations.

### Using Financial Information- Lessons from a Former CEO

Tim McDermott

All financial information tells a story. It's a story pastors, as well as other church and nonprofit leaders, need to know and understand to effectively manage their churches and organizations and to be able to interact effectively with the boards and committees leading the churches and other organizations. In this very interactive session, we will analyze financial statements, look at key areas pastors and nonprofit leaders should focus on and share meaningful tools for board/committee reporting. Come prepared not just to listen, but also bring examples from your own experience.



Nick Nicholaou  
President, MBS, Inc.



Jonathan Smith  
Director of Technology  
Faith Ministries



Phill Martin  
CAE, CCA  
Deputy CEO  
The Church Network



Tim McDermott  
COO  
PraiseFM/Praise Live

12:00 – 1:15 p.m. – Networking Lunch

1:15 – 2:30 p.m. – CONCURRENT SESSIONS

### Keys to a Successful Compensation Plan Elaine Sommerville

More than just a paycheck, a successful compensation plan maximizes benefits to the employee at the lowest cost to the church. From creation to implementation, this session identifies the steps necessary to build a successful plan to compensate employees using cash and noncash benefits and stay within the boundaries set up by the IRS.

### Keeping Your Congregation Safe in a World Where Evil Is Present Michael Lee

Participants will receive an overview concerning: The who, what, where and why of providing church security. Plans, policies and procedures to greatly reduce the risks associated with “soft targets.” Simple, effective tactics and techniques for assessing, addressing and mitigating risks of violence.

### Accelerating Your Acquisition Curt Swindoll

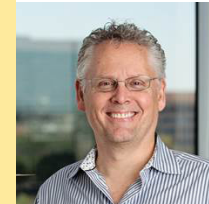
Acquiring new donors is getting increasingly difficult. We live in a noisy world where people are bombarded with 3,000 advertisements every single day. With approximately 1.5 million nonprofits “competing” for attention and support and donor attrition rates averaging 55% across the sector, acquisition is not merely important. It is complicated and critical. The old models of acquisition are changing. How is your organization adjusting to invite new donors to be part of what God is doing in and through your organization?



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



Michael Lee  
Retired FBI Special  
Agent/Unit Chief  
Founder of Oasis Center



Curt Swindoll  
President and  
Executive Counsel  
Grafted Life Ministries

2:30 – 2:45 p.m. – Break

2:45 – 4:00 p.m. – GENERAL SESSION

### Ministry Risks Updates Richard Hammar, JD, CPA

Review the recent legal and risk management developments. This session will also cover statutory and regulatory developments, litigation trends, and case studies.



Richard Hammar  
JD, CPA

# Who Should Attend?

- Senior Pastors
- Executive Pastors
- Board Members
- Church Leaders
- CEO/Presidents
- Church Treasurers
- Chief Financial Officers
- Accountants
- Business and Church Administrators
- Nonprofit Leaders
- Fundraising Executives
- Staff and HR Administrators

*"Session leaders are premier national authorities in church law and tax issues."*

*– 2017 UFLC attendee*

*"Unsurpassed quality legal and tax information affecting churches and other faith-based organizations."*

*– 2017 Attendee*





## 2018 Ultimate Financial and Legal Conference™

October 22-23, 2018  
DFW Marriott South,  
4151 Centreport Blvd.  
Ft. Worth, TX 76155

**CPE Credit**

**Delivery Method:** Group-live

**Program Level:** Beginner to Intermediate

**Prerequisites:** None

**Advanced Preparation:** None

**CPE Credits for CPA & CCA CEUs:** 13 hours (14 hours  
for those attending the optional Form 990 session)

**CFRE Credits:** 11

Alliance for Greater Works 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

**Fax:** 817.864.9006

**Web:** [www.allianceforgreaterworks.org](http://www.allianceforgreaterworks.org)

**Email:** [admin@allianceforgreaterworks.org](mailto:admin@allianceforgreaterworks.org)  
to submit questions

**Conference Cancellation Policy:** Cancellations must be received  
in writing 4 weeks prior to the start date of the conference. After  
September 23, 2018, 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.

## HOTEL ACCOMMODATIONS

### DFW MARRIOTT SOUTH

4151 Centreport Blvd.  
Ft. Worth, TX 76155

To reserve a room(s) for the October 22-23 UFLC,  
Contact Katie Harris: 817-359-4610,  
[katie.harris@marriott.com](mailto:katie.harris@marriott.com)

\*Ask for UFLC blocked rooms

Rate: \$149 available if booked on or before October 2, 2018

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

# REGISTRATION

Please photocopy this form for additional individuals and team members.

Please register me for the 2018 Ultimate Financial and Legal Conference™, October 22-23.

Please tell us if you will be participating:

- ☐ Optional: 990
- INDIVIDUALS**
  - ☐ \$275 (if received by 8-31-18)
  - ☐ \$325 (if received on or after 9-01-18)

Send a team and Save!

**TEAM DISCOUNTS:** Please register my team for the Ultimate Financial and Legal Conference™, 2-5 people

- ☐ \$250 (per person by 8-31-18)
- ☐ \$300 (if received on or after 9-01-18)

**PLEASE SELECT ONE** for your Handouts:

- ☐ Digital copy: FREE
- ☐ Notebook - Hard copy: \$35 per book
- ☐ I/We will attend the Monday night Special Evening of Dinner and Live Theatre \$45 (per person)  (number of attendees)

I would like to make a tax-deductible donation to Alliance for Greater Works \$

TOTAL REGISTRATION: \$

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

**Special Dietary requirements:** Please call 817-835-0271 to discuss alternate meal options.

Name Title		
Church/Organization		
Address		
City	State	Zip
Telephone	Fax	
Email		
<div>Payment Method:</div> <div>Check is enclosed for \$ <input type="text"/></div> <div>Please make CHECKS payable to Alliance for Greater Works and remit to Alliance for Greater Works, Attn: UFLC, 2080 N. Hwy 360, Suite 342, Grand Prairie, TX 75050</div> <div><input type="radio"/> Credit Card payment \$ <input type="text"/></div> <div>Card Number <input type="text"/></div> <div>Name on Card <input type="text"/></div> <div>Signature <input type="text"/></div> <div><input type="radio"/> Visa <input type="radio"/> MC</div> <div>Expiration <input type="text"/></div>		

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