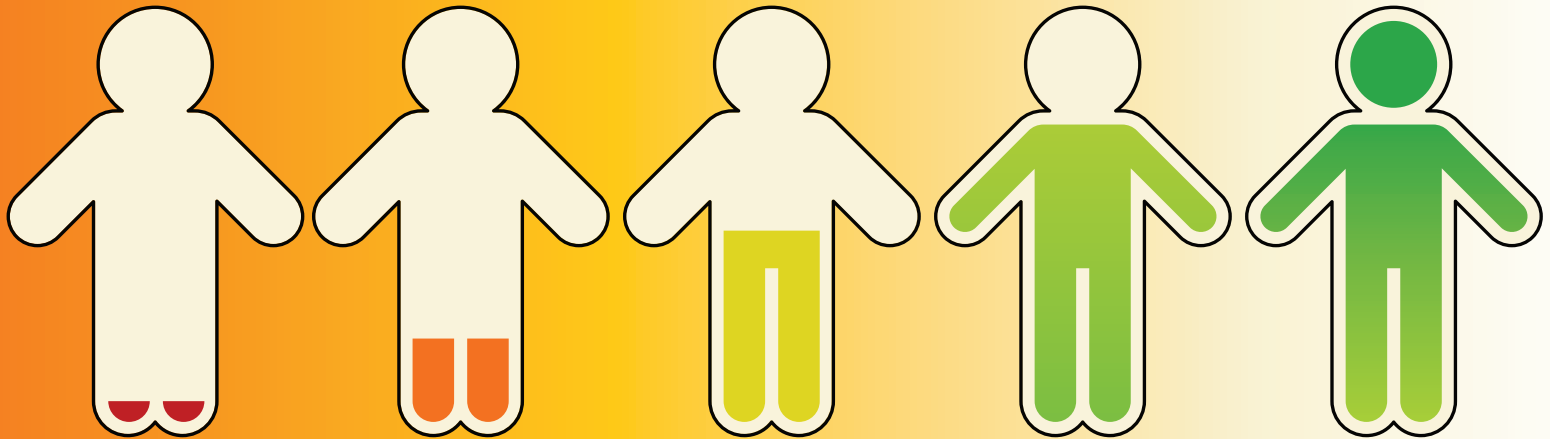


POWER UP!

Recharging for the Future



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

14th Annual
Ultimate Financial
& Legal Conference™

2021 Ultimate Financial and Legal Conference™

Join us October 25-26 at the 14th 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 2021 program will specifically assist you in recharging your ministry in areas of:

- Nonprofit Accounting
- Branding & Marketing
- Employment Law
- Working with A Remote Workforce
- Operating Benevolence & Assistance Programs
- 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 re-energize your church, ministry, or nonprofit!

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

REGISTER TODAY at www.allianceforgreaterworks.org

2021

Ultimate Financial and Legal Conference™ AGENDA

Sunday, October 24

5:00 – 7:00 p.m. Early Registration

Monday, October 25

7:30 – 8:30 a.m. Registration/
Continental Breakfast

8:30 a.m. Announcements

8:45 – 10:00 a.m. General Session

10:05 – 11:05 a.m. Concurrent Sessions

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. General Session

4:30 - 5:30 p.m. Optional: Form 990 Session

6:30 p.m. Optional: Networking Dinner

Tuesday, October 26

7:30 – 8:30 a.m. Registration/Continental Breakfast

8:45 a.m. Announcements

9:00– 10:15 a.m. General Session

10:15 – 10:30 a.m. Break

10:30 – 11:45 a.m. Concurrent Sessions

11:45 – 1:00 p.m. Networking Lunch

1:00 – 2:15 p.m. Concurrent Sessions

2:15 – 2:30 p.m. Break

2:30 – 3:45 p.m. General Session

HOW TO REGISTER

Telephone: 817.835.0271

Fax: 817.864.9006

Web: www.allianceforgreaterworks.org

Email: ajohnson@alliancetx.org to submit questions

Conference Presenters



Paula Burns
CIC, CRM
Insurance One Agency



Sandra Fowler, CPA, CPP
Payroll Manager
Sommerville
& Associates, P.C.



Cory Halliburton
JD, Attorney
Weycer, Kaplan,
Pulaski, & Zuber



Richard Hammar
JD, CPA



Roy Hayhurst
Denominational &
Public Relations
GuideStone



Angela Johnson, PH.D.
Managing Director
Alliance for Greater
Works



Patti Malott
President
Upright Ministries



Liz Morris
The Personality Doctor



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



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



Megan Terrell
Principal - Nonprofit
and Governmental Lead
CliftonLarsonAllen, LLP



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



Sherrye Willis
President, CEO
Alliance for Greater
Works

Day 1: Monday, October 25, 2021

7:30 – 8:30 a.m. – Registration/Continental Breakfast

8:30 – 8:45 a.m. – Opening and Announcements

8:45 – 10:00 a.m. – GENERAL SESSION

Bridging the Generational Gap

Liz Morris

We all want to be seen, heard, and understood, both at work and at home. We can feel misunderstood, devalued, and overlooked, which can cause anxiety, frustration, and self-doubt, both at home and in the workplace. Liz Morris, the Personality Doctor, will share a quick and easy way to confidently communicate and connect with employees and bosses. This allows all leaders, ministries, and churches to bring more value into the marketplace and change the culture from the inside out.

10:05 – 11:05 a.m. – CONCURRENT SESSIONS

Navigating Emerging Risk Today

Paula Burns

The risks facing your church or ministry today are many, but there are common practices that may assist in avoiding certain risks. This session will cover several topics and be an interactive session reviewing:

- The state of the non-profit insurance marketplace today.
- Cyber Attacks are on the rise – what the church/non-profit needs to know.
- Child on child abuse is on the rise – what we need to know as church programming begins ramping up for Summer.

Changing Times – The Transforming Face of Accounting

Megan Terrell

We will discuss the impact of the progressing changes on the accounting profession through such topics as robotics and blockchain, the progressing licensing of CPA's, cryptocurrencies, the impact of remote technologies on internal control, and other advancements. We will also discuss how to use these opportunities to advance and challenge your ministry in a changing world.

11:00 – 11:15 a.m. – Break

"CPE that is actually relevant to church accounting, that I can actually apply to my job!"

~2019 UFLC attendee

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

I Love to Tell the Story: Branding in the Age of Social Media Roy Hayhurst

Your brand is who you are – or more accurately, how members, donors, prospects, and others perceive who you are. In an age of instantaneous (mis)information how do you protect your brand, augment it, and use it to further your organization's goals?

From what to communicate, when, where, and how, to trends in communication, we will discuss the importance of your brand and how it can help your organization achieve its mission and vision with practical insights you can implement today.

The Ins & Outs of Minister Tax Issues Sandra Fowler & Elaine Sommerville

By the end of the session, participants will be able to define who is a minister according to both the Department of Labor and Internal Revenue Service definitions, will gain a better understanding of the dual tax status unique to ministers, and will be able correctly designate and account for the minister's housing allowance. We will also discuss income and expense plans related to ministerial employees.

12:30 – 1:30 p.m. – Networking Lunch

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

Top Ten Things – Employment Law Update Frank Sommerville & Cory Halliburton

Join our favorite attorneys to review current events affecting a religious organization's employment practices including lessons learned from pandemic-work conditions that are here to stay (maybe), remote work and the law, the ministerial exception, and strategies for ministers and exempt and nonexempt employees. Learn how your organization can navigate areas that can sidetrack its ministry and drain valuable resources when things go awry.

Avoiding Leadership Burnout Sherrye Willis

Recently we have experienced a deadly pandemic, unprecedented closings, including schools and churches, and an uptick in social needs and racial discord. All these issues have an impact on the well-being of a leader. How do we, as leaders, mitigate the stress? Come and learn tips to protect yourself and your team from burnout while navigating the uncharted waters of 2021 and beyond.

2:45 – 3:00 p.m. – Break

3:00 – 4:15 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.

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

Form 990: Common Mistakes Still Made After More Than a Decade!

Elaine Sommerville

It has been 12 years since the Form 990 was redesigned by the IRS, but many professionals and organizations still struggle to prepare the return accurately. This session will spend time reviewing the most common mistakes still made and provide tips for preparing an accurate return for use by regulators and the general public.

6:30 p.m. – Optional Networking Dinner

"This conference keeps me informed of important things without information overload. You guys sort through all the mountains of new information and "blah blah blah" and give me what is relevant to me. You keep me sane!"

~2019 UFLC attendee

Day 2: Tuesday, October 26, 2021

7:30 – 8:30 a.m. – Registration/Continental Breakfast

8:45 a.m. – Announcements

9:00 – 10:15 a.m. – GENERAL SESSION

From Allyship to Solidarity: A Purpose-Driven Response for Bridging Racial and Cultural Divides
Angela Johnson & Sherrye Willis

Over the last eighteen months, our world, nation, cities, and neighborhoods have experienced multiple pandemics including COVID-19, civil unrest, and community violence. Each pandemic has impacted us in some way. Yet, many people of faith feel helpless in knowing what to do and what to say. If you are wondering how to navigate the current cultural dynamics in our families, churches, and communities and understand how we can all be a force for healing and harmony, join us for a thought-provoking session that will introduce you to a Biblical framework of diversity, equality, and inclusion.

10:15 – 10:30 a.m. – Break

10:30 – 11:45 a.m. – CONCURRENT SESSIONS

Policies and Procedures for Remote Workers
Patti Malott

Not only will sound work-from-home policies keep employees on track while working offsite, but they will also help avoid potential legal problems that can arise from remote work. This session will cover policies and procedures to safeguard your organization while allowing employees to work remotely

Benevolence – Meeting the Ever-Increasing Need
Elaine Sommerville

The United States is one of the most giving countries in the world and religious organizations are in the forefront of giving. Effects of the recent pandemic have created greater needs to be met with limited funds. Establishing solid benevolence programs and understanding compliance limitations assist organizations in reaching people effectively.

11:45 - 1:00 p.m. – Networking Lunch

1:00 – 2:15 p.m. – CONCURRENT SESSIONS

#MeToo in a #ChurchToo World
Frank Sommerville

In the last 18 months, churches have experienced record levels of disclosures by victims of sexual abuse by church leaders – sometimes for events that occurred decades ago. This session will address how to identify sexual harassment by church leaders and volunteers. We will then discuss how to respond once an allegation has been made. Finally, we will discuss steps the church can take to minimize the risk that will happen in their church.

Accounting for the Future
Ashley Voss

Now is the time to look forward and plan for the future! Whether you are accounting for contracts, commitments, obligations, or simply a vision (and budget) for the future, your accounting should be forward thinking. From capital projects to capital leases, from pledged contributions to retirement obligations, we will learn how to practically account for your future plans and how to comply with the most current accounting standards.

2:15 – 2:30 p.m. – Break

2:30 – 3:45 p.m. – GENERAL SESSION

Tax & Legal Update for Religious Organizations
Elaine Sommerville & 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.

"I am newly working in the non-profit sector of finance (specifically church), so the fact that this was so geared toward churches with relatable examples, was super helpful to me!"

~2019 UFLC attendee

“Time With” Sessions

You won't want to miss out on a little extra time with one of our outstanding presenters!!!
Space is limited – sign up for these sessions at the conference!

Day 1: Monday, October 25, 2021

Cory Halliburton

Discuss your Legal
& HR Questions

10:05 a.m. – 11:05 a.m.

Dondi Hayhurst &
James Hargrove

Q&A with Aplos
Experts

11:15 a.m. – 12:30 p.m.

Lunch with
Elaine Sommerville

Come with Tax
Questions

12:30 p.m. – 1:30 p.m.

Paula Burns

An Insurance
Agent's Analysis

1:30 p.m. – 2:45 p.m.

Day 2: Tuesday, October 26, 2021

Ashley Voss

Ask Your
Accounting
Quandaries

10:30 a.m. – 11:45 p.m.

Lunch with
Frank Sommerville

Bring your
Perplexing Legal
Questions

11:45 a.m. – 1:00 p.m.

Alliance for Greater
Works

Marketing &
Leadership

1:00 p.m. – 2:15 p.m.

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

*"Good humor on serious topics kept the workshops engaging."
~ 2019 UFLC attendee*

*"Relevant to the issues I am dealing with today in the church."
~ 2019 UFLC attendee*

*"Loved the content! It is always great to hear what we are doing well at – and
what we need to work on."
~ 2019 UFLC attendee*

EVENT HOSTS



EVENT SPONSORS



2021 Ultimate Financial and Legal Conference™

October 25-26, 2021
Sheraton Arlington Hotel
1500 Convention Center Drive Arlington, TX 76011

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)

COVID-19 Information: To adhere to recommended social distancing guidelines, participation for the conference is limited to 150 people. We will be adhering to hotel requirements, which state that all attendees not fully vaccinated will be required to wear a mask during your time at the 2021 UFLC.

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
Email: ajohnson@alliancetx.org to submit questions

Conference Cancellation Policy: Cancellations must be received in writing 6 weeks prior to the start date of the conference. After September 15, 2021, 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. In the event the on-site program is required to be cancelled after September 15, 2021, due to government restrictions, registration fees will be refunded.

HOTEL ACCOMMODATIONS

SHERATON ARLINGTON HOTEL

1500 Convention Center Drive
Arlington, TX 76011

To reserve a room(s) for the October 25-26 UFLC, call 800-325-3535 and ask for the Ultimate Financial & Legal Conference room block.

Ask for UFLC blocked rooms

Rate: \$149 available if booked on or before September 25, 2021 Hotel rooms are NOT included in the Ultimate Financial and Legal Conference™ registration fee.

*"Everyone was very helpful,
knowledgeable, and pleasant.
Thank you for all the hard work you
put in with making this conference
a success!"*

- 2019 UFLC attendee

REGISTRATION

Please photocopy this form for additional individuals and team members.

Please be aware that participation for the 2021 UFLC is limited to 150 people to adhere to social distancing guidelines.

Please register me for the 2021 Ultimate Financial and Legal Conference™, October 25-26

Please tell us if you will be participating:

☐ Optional: 990

INDIVIDUALS

☐ \$375 (if received by 8-31-21)

☐ \$395 (if received on or after 9-01-21)

Send a team and Save!

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

☐ \$350 (per person by 8-31-21)

☐ \$375 (if received on or after 9-01-21)

PLEASE SELECT ONE for your Handouts:

☐ Digital copy: FREE

☐ Notebook - Hard copy: \$35 per book

☐ I/We will attend the Monday night Networking Dinner
\$40 (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

Payment Method:

Check is enclosed for \$

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

Credit Card payment \$

☐ Visa

☐ MC

Card Number

Expiration

Name on Card

Signature

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.

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and **Weycer, Kaplan, Pulaski, & Zuber, P.C.**

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