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<u>Paper/Presentation Title</u>	<u>Seminar</u>	<u>Date</u>
Alternative Operating Structures, Governance Best Practices and Fraud Risk Management	32 nd Annual Nonprofit Organizations Institute	01/15/15
Private Foundations: What Should be Keeping You Up at Night	Philanthropy Southwest, 2014 Annual Conference, Phoenix, Arizona	11/06/14
Precursors to Effective Endowment Investing	In It for the Long Haul: Investing to Reach Your Endowment or Reserve Potential, Community Foundation of North Texas, Fort Worth, Texas	10/28/14
Giving with Strings Attached	State Bar of Texas, Governance of Nonprofit Organizations Course, Austin, Texas	08/21/14
Minimum Fiduciary Standards for Nonprofit Directors	2014 Free CPE Day, Fort Worth Chapter, Texas Society of CPAs, Fort Worth, Texas	06/24/14
Governance and Form 990: Understanding the Why and the What	The Nonprofit Management Center of the Permian Basin, Midland, Texas	02/07/14
Public Charities and Private Foundations Reference Outline	AAA-CPA Southwest Regional Education Conference, Texas A&M Law School, Fort Worth, Texas	01/25/14
Public Charity Basics Reference Outline	31 st Annual Nonprofit Organizations Institute	01/15/14
IRS Audits of Nonprofit Organizations	Fort Worth Chapter, TSCPA Nonprofit Study Group	09/24/13
Grantmaking: The Good, The Bad, and The Proceed with Caution	Dallas Nonprofit Study Group	09/18/13
Keeping the Faith or Escaping the Dead Hand: Planning Techniques to Ensure No Mission Drift	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/22-23/13

Resolving Trustee Disputes: Foundation Split-Ups and Other Approaches	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/22-23/13
Nonprofit Organization Compliance with the Texas Business Organizations Code	The Nonprofit Management Center of the Permian Basin, Midland, Texas	08/12/13
Corporate Governance in the Nonprofit Setting	Southern Methodist University School of Law Role of the General Counsel	03/26/13
Governance of Nonprofit Organizations	The Nonprofit Management Center of the Permian Basin	02/01/13
Primer on Private Foundations	30 th Annual Nonprofit Organizations Institute	01/16-17/13
A Basic Framework of the Nonprofit Sector	30 th Annual Nonprofit Organizations Institute	01/16-17/13
Corporate Governance in the Nonprofit Setting	Southern Methodist University School of Law, Role of the General Counsel	11/06/12
Critical Compliance and Ethics Issues for Nonprofit Tax-Exempt Organizations	Tarrant County Bar Foundation Mission Possible Pro Bono Summit	10/23/12
The Mission: Create a Climate for Effective Governance	Texas C-Bar Pro Bono Week (Dallas)	10/22/12
The Design and Implementation of Conflict of Interest and Gift Acceptance Policies	Fort Worth Chapter TSCPA Nonprofit Organizations Conference	09/25/12
Who Would Have Thought: Charitable Trusts as a Viable Entity	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/23-24/12
Social Media: Legal Issues for Churches	National Association of Church Business Administrators Certification Course, Fort Worth, Texas	06/07/12
Recognizing and Avoiding Self-Dealing: Both Direct and Indirect	Dallas Society of CPAs, Annual Conference	05/04/12
Grantmaking: The Good, The Bad and The Proceed With Caution	Salk Institute 40 th Annual Tax and Management Seminar for Private Foundations, La Jolla, California	03/14-16/12
Recognizing and Avoiding Self-Dealing: Both Direct and Indirect	Salk Institute 40 th Annual Tax and Management Seminar for Private Foundations, La Jolla, California	03/14-16/12

Primer on Private Foundations	University of Texas 29 th Annual Nonprofit Organizations Course, Austin, Texas	01/18-20/12
Overview of Nonprofit Organizations: The Basic Framework	University of Texas 29 th Annual Nonprofit Organizations Course, Austin, Texas	01/18-20/12
Religion and Religious Organizations: Keeping Your Church Out of Court	University of Texas 29 th Annual Nonprofit Organizations Course, Austin, Texas	01/18-20/12
Program-Related Investing	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/18-19/11
Governance of Nonprofit Organizations	University of Texas 28 th Annual Nonprofit Organizations Institute, Austin, Texas	01/12-14/11
Donor Intent Lawsuits: A Ten Year Overview (Paper Author)	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/19-20/10
Governance and Liability Issues for Religious Organizations	National Association of Church Business Administrators Certification Course, Fort Worth, Texas	06/10
Primer on Nonprofit Organizations and Charitable Giving	University of Texas 27 th Annual Nonprofit Organizations Institute, Austin, Texas	01/13/10
Current Compliance Issues for Your Charities: Private Foundation Primer	State Bar of Texas 33 rd Annual Advanced Estate Planning & Probate Course, Houston, Texas	06/10-12/09
Federal Legislation and Regulatory Update	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	2009
Primer on Nonprofit Organizations and Charitable Giving	University of Texas 26 th Annual Nonprofit Organizations Institute, Austin, Texas	01/14-16/09
Fiduciary Duties and Potential Liabilities Relating to Charitable Entities' Decision Makers	Fort Worth Chapter, Texas Society of CPAs	01/13/09
Governance—What's Changed	Fort Worth Chapter, Texas Society of CPAs	01/13/09

Course Director	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/08
Fiduciary Duties and Potential Liabilities Relating to Charitable Entities	State Bar of Texas 32 nd Annual Advanced Estate Planning & Probate Course, Austin, Texas	06/13/08
Governance and Liability Issues for Religious Organizations	National Association of Church Business Administrators Certification Course, Fort Worth, Texas	06/08
Essential Skills & Strategies for New Grantmakers: Navigating Legal and Ethical Issues	Conference of Southwest Foundations, Las Vegas, Nevada	04/24/08
Nonprofit Director and Officer Liability	Nonprofit Law Study Group, Dallas	04/16/08
Ethical Issues Representing Nonprofit Organizations	University of Texas 25 th Annual Nonprofit Organizations Institute, Austin, Texas	01/16-18/08
Primer on Nonprofit Organizations and Charitable Giving	University of Texas 25 th Annual Nonprofit Organizations Institute, Austin, Texas	01/16-18/08
Primer on Private Foundations (Charitable Contribution Planning Opportunities – Public Charities and Private Foundations)	North Texas Estate and Financial Planning Council, Wichita Falls, Texas	11/19/07
Nonprofit Director and Officer Liability	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	08/2-3/07
2006 Tax and Legal Review and Update	Church Administration Conference, Brentwood, Tennessee	04/23/07
Avoiding the Red Card: Standards of Conduct of Decision Makers of 501(c)(3) Charitable Trusts and Nonprofit Corporations	Fort Worth Chapter, Texas Society of CPAs	01/26/07
Basics of International Grantmaking	University of Texas 24 th Annual Nonprofit Organizations Institute, Austin, Texas	01/12/07
Primer on Nonprofit Organizations and Charitable Giving	University of Texas 24 th Annual Nonprofit Organizations Institute, Austin, Texas	01/10-12/07

Avoiding the Red Card: Standards of Conduct of Decision Makers of 501(c)(3) Charitable Trusts and Nonprofit Corporations	State Bar of Texas Governance of Nonprofit Organizations Course, Austin, Texas	8/10-11/06
Governance and Liability Issues for Religious Organizations	National Association of Church Business Administrators Certification Course, Fort Worth, Texas	06/06
Primer on Nonprofit Organizations and Charitable Giving	University of Texas 23 rd Annual Nonprofit Organizations Institute, Austin, Texas	01/11-13/06
Keeping Your Church Out of Court: Avoiding Legal Landmines when Communicating	2005 Church Staff Conference & Expo, Houston, Texas	03/17/05
Keeping Your Church Out of Court: Employment Law Primer for Churches	2005 Church Staff Conference & Expo, Houston, Texas	03/17/05
Keeping Your Church Out of Court: General Liability Issues	2005 Church Staff Conference & Expo, San Antonio, Texas	03/17/05
Employment Law Primer for Churches	9 th Annual Church Staff Conference & Expo, San Antonio	09/16/04
Nonprofit Organizations Entering into the Commercial Marketplace	9 th Annual Church Staff Conference & Expo, San Antonio, Texas	09/16/04
Setting Up Your 501(c)(3) Non-Profit Organization	State Bar of Texas Representing Nonprofit Organizations, Austin, Texas	07/16/04
Governance and Liability Issues for Religious Organizations	National Association of Church Business Administrators Certification Course, Fort Worth, Texas	06/04
A Brave New World: Nonprofit Entry Into the Commercial Marketplace	Southern Baptist Business Officers Conference, Dallas, Texas	03/17/04
Employment Law Primer for Churches	Southern Baptist Business Officers Conference, Dallas, Texas	03/17/04
Employment Law Primer for Churches	Large Church Administrators Conference, Dallas, Texas	02/20/04
Get In, Get Out, Get on With Your Life: Avoiding Fiduciary Litigation and Weathering the Storm of Trial When You Can't	Brazos Valley Estate and Financial Planning Council, College Station, Texas	2003
Governance and Liability Issues for Religious Organizations	National Association of Church Business Administrators Certification Course, Fort Worth, Texas	06/02

Keeping Your Church Out of Court: Avoiding Legal Landmines when Communicating	Southwestern Baptist Theological Seminary, Fort Worth, Texas	09/20/02
Avoiding Legal Landmines: How Religious Professionals Can Recognize and Avoid Hidden Legal Liabilities	Texas Law for Texas Clergy; Texas Wesleyan School of Law, Fort Worth, Texas	05/11/01
Keeping Your Church Out of Court	Presented throughout Texas, Louisiana, Mississippi, and Georgia	2000-Present