2026

NONPROFIT SYMPOSIUM

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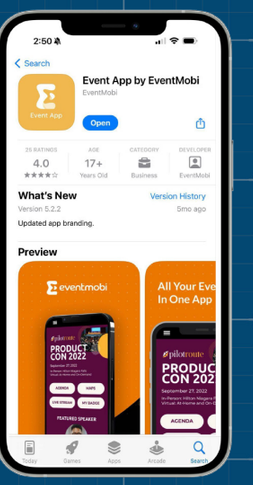
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MON 11/30	ROOM 146	ROOM 150	ROOM 151	ROOM 152
	9:30-10:00 REGISTRATION			
10:00-10:10 AM	**Opening Welcome** Maria Georges, Symposium Chair			
10:10-11:00 AM	**Economic Update** Jason Pride			
	20 MINUTE BREAK			
11:20 AM-12:10 PM	**Beyond the Hype: Real AI Use Cases from Nonprofit CFO's - Practical AI Solutions for Nonprofit Finance & Accounting Teams** Divya Gadre, Robby Vanrijkel, Anthony Latta, Kote Lomidze	**This is Not as New as AI - Just a Persistent One: Breaking Finance & Program Silos for Good** Alex Shin, Chris Lawrence	**Welcome to Your New Reality - How to Reduce Single Audit Anxiety in the Shifting Grants Compliance Landscape** Julien Decosimo, Kathleen Kizior	**The Art of Dual-Entity Accounting: Managing Grants, Allocations, Shared Services, and Financial Reporting in a Multi-Entity Nonprofit Structure** Mabel Imala, Kathy O'Connor
12:10-1:30 PM	**Lunch (Room 145) / Lunch + Learn Demo Stage (Room 147)** 12:30 - Less Chasing, More Closing with AI's Capabilities from Brex (a Capital One company) 1:00 - Less Stress, More Clarity - Scenario Budgeting to Prepare for the Pivot (Han Group & Martus)			
1:30-2:20 PM	**Accounting/FASB Update** Rick Cole	**What Changed, What's Next: 2026 Tax Year-End Review and 2027 Outlook for Exempt Organizations** Ray Ly, David Stark	**Beyond Collaboration: Building High-Performing Teams Through Change and Uncertainty** Shereen Mahoney, Marcie Bomberg Montoya	
	15 MINUTE BREAK			
2:35-3:25 PM	**CFO Financial Communications and Interactions with Boards** Paul Preziotti, A. Michael Gellman	**Designing Audit-ready Internal Controls** Doug Boedeker, John Greene	**The Accountant's Role In Grantwriting: Building Your Case For a Seat at the Table** Sarah Loghin, Tamara Vineyard	**990 Problems but the Presentation Ain't One: Engaging Your Audience** Kelli Polon, Laura Farrell
	15 MINUTE BREAK			
3:40-4:30 PM	**Ask the Nonprofit Attorney** Jeff Tenenbaum	**Oracle Cloud Full-Suite Implementation at Scale: Lessons Learned** Corey Hastings, Indre Karimov	**Manage Grants with AI, Not Spreadsheets** Srikar Chinam	**Fractional, Contract, Remote – OH MY! Identifying Opportunities and Managing Risks in Today's Workforce** Paul Phelan, Meghan Hopkins, Andrew Leggett
	15 MINUTE BREAK			
4:45-5:45 PM	**The ROI Lie: Why Transformation Fails and What to Measure Instead** Ilana Esterrich			
	5:45-7:30 PM NETWORKING RECEPTION - SPONSORED BY KARMASUITE KarmaSuite			

TUES 12/1	ROOM 146	ROOM 150	ROOM 151	ROOM 152
	7:30 – 8:00 AM: CONTINENTAL BREAKFAST			
8:00-8:50 AM	**From Mission to Leadership: Building Your Path to the CFO, COO or CEO Role** Rosye Cloud, Doug Palmer, Lauren Hough-Flickinger	**UBIT In Focus: Key Updates for Exempt Organizations** Amanda Adams	**What's the Risk? How to Use Risk to Manage Federal Grant Partnerships** Rachel Werner	**What's Normal for Nonprofit Reserves? Using Peer Benchmarking to Support Better Financial Decisions** Dennis Gogarty, Mark Murphy
	20 MINUTE BREAK			
9:10-10:00 AM	**What's Keeping Nonprofit Controllers Up at Night? Practical Solutions to Today's Most Common Finance Challenges** Jared Basco, Alison Benson, Katie Golden, Bryant Davis		**ESG Investing: Dead, Evolving, or Making a Comeback? What Nonprofits Need to Know Now** Adam Proger	**Reserves, Risk & Readiness: Aligning Investment Strategy with Real-World Needs** Julie Jones, Ann Marie Etergino
	25 MINUTE BREAK			
10:25-11:40 AM	**CFO Decision-Making Under Pressure: Liquidity, Risk & the Story Behind the Numbers** Joanna Friedman, Tom Evans, Clare Golla, Angela Hillman	**Fiscal Resilience Under Pressure: Building Endurance in an Era of Uncertainty** Lee Klumpp	**Form 990 - Can You Spot the Mistakes?** Fred Longwood, Katelyn Miller	**Beyond Indirect Cost Recovery: When Fully Funded Still Falls Short** Laura Douglas, Duc Nguyen, KeneryGallagher
11:40 AM-12:30 PM	Lunch (Room 145) / Lunch + Learn Demo Stage (Room 147) 12:00 - Beyond the Spreadsheet: Modernizing Cash Forecasting for Nonprofits (Bank of America)			
12:30-1:45 PM	**Revenue Diversification in Nonprofits: Strategic, Fundraising, and Endowment Perspectives** Walter Dillingham, Lydia Wolf, Tom Ciolkosz, Terri Stewart	**Hot Issues in Employment Law** Jeff Pargament		**Ask the Tax Experts: Real Time Insights on EO Tax Challenges** Lisa Heller, Mike Sorrells, Calvin Marks
	15 MINUTE BREAK			
2:00-2:50 PM	**Surviving the Spotlight: Form 990 Risk Management, Governance, and Legislative Changes** Todd Teresco, Sandra Feinsmith	**Classify With Confidence: Functional Expense Best Practices for Today's Nonprofit Finance Leader** Lindsay Dean, Kim Erb	**Sales & Use Tax Risk for Nonprofits: Why It Matters and How Technology Can Help** Ilya Lipin, Jamie Brenner	**Building Your Nonprofit Technology Roadmap: From Reactive Spending to Strategic Investment** Theron Kelso, Hartmuth Csanadi-Schwartz
	15 MINUTE BREAK			
3:05-3:55 PM	**Unlocking Performance: Cultivating Finance Teams That Deliver and Stay** Allison Shepter Law, Brittney Gordon		**Deferred Compensation Decoded: Practical 457(b) and 457(f) Strategies for Nonprofits** Kendra Janevski, Dennis Gogarty	**Leveraging Strategy and Risk Management to Drive Operational Excellence** Mac Lillard, Thomas Brown
	15 MINUTE BREAK (BINGO CARDS LAST CALL AND SILENT AUCTION ENDS)			
4:10-5:00 PM	**Quiz Show, With Your Host Daniel Lynch** Doug Boedeker, Alex Galeano, Paul Kerrigan, Julia Lafferty, Omid Mohebbi, Marta Sokol			

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