



Summer 2017

The Crowe Not for Profit and Higher Ed Leadership Series



Monthly View Planning Calendar

July 2017

Jul
20

Indianapolis

INCPAS NFP Conference

“Time for a UBI Check-Up”

Presenters: Rachel Spurlock, Partner, and Emilie Knieriem, Crowe Horwath LLP

The IRS has increased its focus on unrelated business income (UBI) activities and, with changes in its information document request (IDR) process being implemented later this year, there may be more audits on the horizon. This session should help you to identify risks and learn about best practices for documentation and recordkeeping to support UBI or non-UBI positions.

“Simple and Effective Methods for Strengthening Internal Controls to Combat Fraud Opportunities”

Presenters: Chris DuKate and Kevin Kerswick, Crowe; Ann Merkel, National Bank of Indianapolis

This session will focus on strategies and best practices for strengthening your internal control environment that are both simple to implement and cost-effective without placing an undue burden on your staff. The session will also provide examples of real-life fraud and will include a discussion on the breakdown in controls that allowed the fraud to occur.

<http://www.incpas.org/cpe/professional-development/conferences/not-for-profit-conference>

Jul-Aug
29-1

Minneapolis

National Association of College and University Business Officers Annual Meeting 2017

Crowe will be exhibiting and presenting at this year's NACUBO conference. Please visit us at Booth 530.

“A New Approach to Education Affordability: Income-Sharing Agreements”

Presenters: Pete Ugo, Partner, Crowe; Mary Claire Cartwright, Assistant Vice President of Information Systems, Purdue Research Foundation

An alternative to a traditional student loan, the income-sharing arrangement (ISA) is a potentially less-expensive approach to making students' educational goals more affordable and attainable. Hear how one institution, through its research foundation, has created a program that enables students to benefit from this industry-changing educational financing vehicle.

www.nacuboannualmeeting.org

August 2017

Alternative Investment Boot Camps

Please join our thought leaders for an interactive webinar that is designed to help organizations tackle the challenges that may arise with tax reporting for alternative investments. Crowe will host an intensive, hands-on, two-hour workshop focusing on the tougher compliance issues, including methodologies used to track large volumes of investments and K-1s, federal and state unrelated business income considerations, and foreign reporting disclosures.

Aug
1

Webinar

Alternative Investment Boot Camp – Federal Issues for Private Foundations

Presenters: Jackie Coburn and Diane Brown, Crowe

Aug
2

Webinar

Alternative Investment Boot Camp – Federal Issues for Higher Education, Healthcare, and Not-for-Profit Organizations

Presenters: Jenny Burke and Danielle Tewes, Crowe

Aug
8

Webinar

Alternative Investment Boot Camp – State and International Issues for Private Foundations

Presenters: Emilie Knieriem, Kevin Spiegel, and Kristin Kranich, Crowe

Aug
9

Webinar

Alternative Investment Boot Camp – State and International Issues for Higher Education, Healthcare, and Not-for-Profit Organizations

Presenters: Robbie Williams, Kevin Spiegel, and Kristin Kranich, Crowe

September 2017

Sept

18-21

Nashville, TN

Seventh Annual Crowe Healthcare Summit

Leaders throughout the healthcare industry will attend the seventh annual Crowe Healthcare Summit. Join them – along with hundreds of your peers – on Sept. 18-21 to glean industry insights in educational sessions, network with peers from across the country, and have a little fun in the “Music City.”

Speakers from leading healthcare organizations will discuss the current state of healthcare reform, regulatory best practices, and technology-enhanced innovations in one of the largest healthcare hubs in the country. CPE credit is available for the sessions, and you’ll have plenty of time to network with your peers.

Crowe Revenue Cycle Analytics (Crowe RCA) Boot Camps are being completely revamped for 2017 to incorporate fresh case studies, story problems, and even more group dialogue. The event is targeted to meet the needs of both new and experienced Crowe RCA users, and specialists will present in-depth information about various aspects of the Crowe RCA tool and will address user obstacles.

<https://www.crowehorwath.com/events/hc-summit-2017/>

Sept.

22-25

Denver, CO

Association of School Business Officials 2017 Annual Meeting and Expo

Crowe will be exhibiting at this year's ASBO conference. Please stop by Booth 320.

<http://asbointl.org/meetings/annual-meeting-expo>

Upcoming Events

Oct
1-3

CACUBO Annual Meeting

<http://www.cacubo.org/event/annual-meeting/>

Columbus, OH

Oct
15-18

EACUBO Annual Meeting

<http://www.eacubo.org/>

Pittsburgh, PA

Oct
18

“Maintaining a Solid Foundation – Assessing Risk Beyond Income Taxes for Private Foundations”

Presenter: Niki Bencik, Partner, Crowe

Webinar

Oct
22-24

NACUBO 2017 Tax Forum

http://www.nacubo.org/Events_and_Programs/2017_Tax_Forum.html

Portland, OR

The Crowe Revenue Cycle Analytics (Crowe RCA) solution was invented by Derek Bang of Crowe Horwath LLP. The Crowe RCA solution is covered by U.S. Patent number 8,301,519.

About the Crowe Not for Profit and Higher Ed Leadership Series

Combining thought leadership and industry specialization, the Crowe Not for Profit and Higher Ed Leadership Series connects business officers in the tax-exempt community with information about recent developments and best practices. The series includes articles, webinars, and email alerts to help you stay current with pressing issues that affect your organization. Sign up at crowehorwath.com/ps-ecommunications to receive timely notifications via email about the resources outlined here. For more information, contact Pete Ugo at pete.ugo@crowehorwath.com or +1 317 208 2509.

About Us

Crowe Horwath LLP (www.crowehorwath.com) is one of the largest public accounting, consulting, and technology firms in the United States. Under its core purpose of “Building Value with Values®,” Crowe uses its deep industry expertise to provide audit services to public and private entities while also helping clients reach their goals with tax, advisory, risk, and performance services. With offices coast to coast and 3,000 personnel, Crowe is recognized by many organizations as one of the country’s best places to work. Crowe serves clients worldwide as an independent member of Crowe Horwath International, one of the largest global accounting networks in the world. The network consists of more than 200 independent accounting and advisory services firms in more than 120 countries around the world.



Crowe is a proud sponsor of the
NACUBO Distance Learning Studio.



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In accordance with applicable professional standards, some firm services may not be available to attest clients.

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