YH EXEMPT ORG UNIVERSITY

2014 Exempt Organization Summer Webinar Series

Available Online

Tuesdays at 9:00am | July 2014

Who Should Attend This Webinar Series?

CPAs | Attorneys | EO Consultants
Executive Directors | CFOs | Controllers
Board Members | Foundation Managers

learn more or register | yhadvisors.com/yheou | info@yhadvisors.com | 310.982.2803

EXEMPT ORGANIZATIONS CURRENTLY FACE INCREASING SCRUTINY AND OVERSIGHT FROM VARIOUS EXTERNAL SOURCES, RANGING FROM THE INTERNAL REVENUE SERVICE, TO STATE ATTORNEYS GENERAL, TO CHARITY WATCHDOGS, TO THE GENERAL PUBLIC.

This distinctive webinar series will delve into the most pertinent tax and legal topics confronted by different types of exempt organizations. Attendees will gain an in-depth understanding of the most salient rules and regulations which any exempt organization, big or small, needs to be cognizant of. The series will build up upon each successive week to provide a comprehensive education on exempt organizations and their reporting requirements.

Led by Brian Yacker and Lauren Haverlock of YH Advisors, who together possess over 30 years of experience exclusivly working with exempt organizations, this series will offer technical education as well as personal insight and intellectual discussion, designed to educate and stimulate the participants, with topics that include:

A Tour of the Form 990 | July 8, 2014

Form 990: The Schedules | July 15, 2014

Form 990-PF Primer | July 22, 2014

Form 990-PF: The Excise (Penalty) Taxes | July 29, 2014

Tour of the Form 990

Date: July 8, 2014

Time: 9:00am - 1:00pm (Pacific)

Level: Beginner

Focused on the new or relatively inexperienced Form 990 preparer; this webinar will provide a summary of the key Form 990 core form preparation issues, including the addressing of filing thresholds, late filing penalties, amended returns, Form 990 "red flags", e-filing, completion of the compensation table, program service activities, governance, and expense allocations.

Form 990: The Schedules

Date: July 15, 2014

Time: 9:00am - 1:00pm (Pacific)

Level: Intermediate

Will cover most of the 16 different Form 990 Schedules, with primary focus on Schedule A (public support test), Schedule B (contributors), Schedule C (lobbying and political activities), Schedule F (foreign), Schedule G (special events), Schedule L (insider transactions), Schedule M (non-cash contributions), Schedule O and Schedule R (related entities).

Form 990-PF Primer

Date: July 22, 2014

Time: 9:00am - 1:00pm (Pacific)

Level: Beginner

Focused on the new or relatively inexperienced Form 990-PF preparer, this webinar will provide a summary of the key Form 990-PF preparation issues, including the calculation of net investment income, the allocation of expenses on Part I of the Form 990-PF, the calculation of fair market value, the calculation of a private foundation's minimum distribution requirements, how to best complete Part VII of the Form 990-PF, reporting of disqualified person compensation, how to complete Part XIII of the Form 990-PF and the necessary information to report regarding a private foundation's qualifying distributions.

Form 990-PF: The Excise (Penalty) Taxes

Date: July 29, 2014

Time: 9:00am - 1:00pm (Pacific)

Level: Intermediate

Will address the net investment income tax and the five (penalty) excise taxes which potentially can be imposed on private foundations. Primary focus will be on minimizing the net investment income tax, avoiding self-dealing transactions and best addressing potential taxable expenditures. Additionally, strategies will be provided to best address a private foundation's minimum distribution requirements and to best avoid excess business holdings and jeopardizing investments.

Learning Objectives

- Gain an understanding of the most important Form 990 and Form 990-PF preparation issues and concepts.
- Become aware of the most significant Form 990 and Form 990-PF reporting "red flags".
- Become familiar with the most prominent Form 990 Schedule issues.
- Become familiar with the most prominent excise taxes imposed on private foundations.
- Receive answers to your most pressing Form 990 and Form 990-PF preparation questions.

Cost

Early Registration (Before May 22, 2014)

1 Webinar	$219
2 Webinars	$399
3 Webinars	$579
All 4 Webinars	$759

Regular Registration (On or After May 22, 2014)

1 Webinar	$239
2 Webinars	$459
3 Webinars	$679
All 4 Webinars	$899

Registration

To register for any or all of the above sessions from the Summer 2014 EO Webinar Series to be conducted by YH Advisors, please send an e-mail to info@yhadvisors.com with the attached registration form or fax the attached registration form to 323.320.4366. If for any reason you cannot email or fax the attached registration form, please send us an email including all of the following information:

- Name
- Firm / Organization
- Title
- Mailing Address
- Telephone
- Listing of Which Webinars Registering for (Tour of the Form 990 Core Form / Form 990: The Schedules / Form 990-PF Primer / Form 990-PF: The Excise (Penalty) Taxes)

Subsequent to sending this e-mail to info@yhadvisors.com, we will then send you the appropriate link to remit payment via PayPal. Soon after remittance of the proper payment via PayPal, we will send you a registration confirmation (receipt) listing all of the webinar sessions for which you registered. Additionally, you will receive an e-mail from GoToWebinar with all the appropriate login information.

Registration Form

YH Advisors Exempt Organization University

Summer Webinar Series

Tuesdays | July 2014

- ❑ Tour of the Form 990
  Tuesday, July 8, 2014
- ❑ Form 990: The Schedules
  Tuesday, July 15, 2014
- ❑ Form 990-PF Primer
  Tuesday, July 22, 2014
- ❑ Form 990-PF: The Excise (Penalty) Taxes
  Tuesday, July 29, 2014

How to Register:

1. Send an **email** to info@yhadvisors.com and include this registration form or fax this registration form to 323.320.4366.

2. We will then email you the appropriate link to **remit payment** based on the chosen sessions. You can also mail a check to:

   YH Advisors
   Attn: Summer Webinar Series
   7755 Center Avenue, Suite 1225
   Huntington Beach, CA 92647

3. Upon receipt of your payment, we will register you for the sessions chosen. Within two weeks of your payment, you should receive an email(s) directly from GoToWebinar with login instructions for each webcast.

Name | Email Address

Firm / Organization | Title

Address

City | State | Zip

Phone Number | Fax Number

Course Materials:

As part of YH Advisors' continuing efforts to go green and maintain a paperless office, all course materials will be provided to you via e-mail at least two days prior to the session. No course books will be provided for this webinar series. Please consider the environment before printing your materials.

Policies

Essentials

As with all of our previous webinars, this entire webinar series will be conducted through GoToWebinar. We offer webinar attendees the option to access the audio portion of our webinars either through their computers (VOIP) or via a telephone call-in number. Recordings of each of these webinars will be available sometime in early August if you are unable to attend any of the webinars at the scheduled time.

Recordings

In early August, recordings of each of the four separate webinar sessions will be available for purchase at the regular registration price. Please contact us at info@yhadvisors.com if you would like to purchase any or all of the webinar recordings.

Registration

Registration and any applicable discount is subject to approval by YH Advisors, Inc. Mulitple webinar registration discounts are provided per single registrant. Within fourteen business days after completion of the registration and the processing of payments, GoToWebinar will provide an email confirmation regarding attendance. If you do not receive such, please contact YH Advisors at info@yhadvisors.com or 310-982-2803.

Cancellations/Substitutions

Please send your cancellation notice via email to info@yhadvisors.com by 5:00 PM PDT on Tuesday, July 1, 2014 for a refund (less $50 administrative fee) for any part of the series. All cancellations must be made in writing. Substitutions are accepted at any time prior to the start of the program. For any questions regarding our refund policy, please contact Brian Yacker at 310-982-2803 or byacker@yhadvisors.com.

Program Cancellation Policy

In cases where YH Advisors must cancel a session, each registered participant will be notified at least 24 hours prior to the class via email. A full refund or credit toward a future session will be provided. For any questions regarding refunds or cancellations, please contact Brian Yacker at 310-982-2803 or byacker@yhadvisors.com.

Satisfaction Guarantee

We are confident that you will leave this webinar series with more than enough ideas and insights to make your time and monetary investment pay off. However, if you feel you have not received your money's worth by the end of the series, please contact Brian Yacker at byacker@yhadvisors.com. We promise that all refund requests will be carefully reviewed and analyzed.

Complaint Resolution

All complaints will be carefully reviewed and responded to for prompt resolution. For any questions or complaints, please contact Brian Yacker at 310-982-2803 or byacker@yhadvisors.com.

CPE

Four (4) hours of CPE credit will be provided to all separately registered attendees of each of the **separate** webinars who complete all of the required polling questions and who complete/submit a webinar evaluation form. Only the registered attendee who logs into the webinar, responds to the polling questions and completes and submits the evaluation form will receive CPE credit. The webinar will not support multiple registrants from a single location.

Continuing Education Credits

YH Advisors is registered with the National Association of State Boards of Accountancy ("NASBA") as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Attorney attendees seeking CLE should check with their particular state's licensing authority regarding the obtaining of credit for attending the webinar series.

NATIONAL REGISTRY OF CPE SPONSORS