SELECT PROFESSIONAL PRESENTATIONS AND PUBLICATIONS


Endowment Agreements: Review of Legal Considerations and Investment Strategies (co-presenter with representative from Northern Trust), Nonprofit Boot Camp hosted by Briggs & Veselka Co., Houston, TX, Sept. 2019.


IRS Audit of Tax-Exempt Entity: Case study of IRS audit that involved hundreds of international grants, complex accounting, and hundreds of thousands of documents, Nonprofit Study Group, Dallas, TX, Feb. 2019.


Guiding Philanthropic and Association Leaders, Dallas Bar Association’s Headnotes Nov. 2018.

Legal, Tax and Leadership: A presentation to trade association executives, Texas Chamber of Commerce Executives Annual Conference, Grapevine, TX, June 2018.
Charitable Contributions Beyond the Border: Article addressing challenges of international grant-making, Published in The Church Network™ Summer 2017 edition of InSight and in Texas Society of Certified Public Accountants January/February 2017 edition of Today’s CPA.


Legal and Tax Update – Developments in tax-exemption issues, employment law, ministers and the law, and FLSA update, with emphasis on religious organizations – Presbyterian Church (USA), Mid-Council Conference, Clearwater, FL, Nov. 2016.


for the Court and Zealous Client Representation: How to effectively comply with the Texas Disciplinary Rules of Professional Conduct – Texarkana Bar Association, Texarkana, TX, May 2014; Nonprofit Study Group, Dallas, TX 2015; State Bar of Texas, Austin, TX August 2015.


Internal Warfare: Addressing/Resolving Board Discord – University of Texas 30th Annual Nonprofit Law Institute, Austin, TX, Jan. 2013 (Panel).

Update on Significant Case Law, Legislation and IRS Activity. State Bar of Tex. 10th Annual Governance of Nonprofit Orgs, Austin, TX, Aug. 2012.

Don’t Get Caught with Your Legal Briefs Down – North Texas Chamber of Commerce Executives, Irving, TX, Aug. 2012.

Rules for Private Foundations-Directors and Officers Training, Private Foundation, – Houston, TX, July 2012. Ministers and Taxation – Victory Family Church, Cranberry Township, PA (Skype) 2012.


Nonprofit Governance and Fiduciary Duties Under the Microscope – United Way of Greater Houston, Houston, TX, 2011.


Xpert HR, Contributing Author (2012), Texas-specific content for Employment Law Manual: Classification; Minimum Wage; Child Labor; Enforcement, Liability, Prevention, Defense