
McConnell & Jones LLP presents the

2011 Fall Roundtable

Accounting Practices for Successful Fundraising Events
for Nonprofit Organizations



McCONNELL & JONES LLP
CERTIFIED PUBLIC ACCOUNTANTS

Tax Deadlines for Tax Year 2011

January 31, 2012

Mail out W2's and 1099 to employees

February 28, 2012

W2, 1099 to Social Security Administration

March 31, 2012

Electronic filing of forms 1098, 1099, W2's

May 15, 2012

NFP Form 990 or F-8868-First Extension

Extended Deadlines

August 15, 2012

Form 990 or second extension F-8868 Part II

November 15, 2012

Final deadline to file Form 990

Today's Panelists

Jeff Gentry, CPA, CMA, CPP

Executive Vice President and Chief Financial Officer
South Central Region of the National Multiple Sclerosis Society



EXPERIENCE

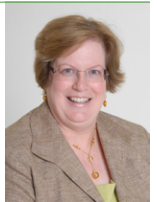
- Over 16 years experience in nonprofit management
- Centralized and streamlined financial operations for five states, resulting in increased service levels for those impacted by Multiple Sclerosis

EDUCATION

MA – University of Mississippi

Cheryl O'Brien, CPA

CFO / Controller
Junior Achievement of Southeast Texas



EXPERIENCE

- Audit Committee Chairman, First United Methodist Church
- 25 years of public accounting background, primarily in audit
- Focus areas in employee benefit plans and nonprofit entities

EDUCATION

BSBA – Accounting, Ohio State University
MBA – Finance, Texas A&M University

Amber Baker

Senior Vice President
American Heart Association Southwest Affiliate's Houston Gulf Coast Division



EXPERIENCE

- Serves in numerous roles as leader, volunteer manager, fundraiser and health educator
- Extensive experience growing AHA's volunteers, boards, Heart Walks, Galas, and "Go Red for Women" events
- Events have raised almost \$1.5M to help fight heart disease and stroke

EDUCATION

BA – Human Development and Family Studies/ University of Houston

Tené Thomas, CPA

Partner, Tax Services Practice Leader
McConnell & Jones LLP Houston, Texas



EXPERIENCE

- 15+ years technical experience in tax compliance and accounting with extensive nonprofit experience including preservation of exempt status, preparing organizations for obtaining and securing IRS exempt status, unrelated business income tax planning, combined fundraising campaigns, state charitable registration, and tax compliance.

EDUCATION

BSBA – California Polytechnic University, Pomona, CA

Helpful Links

EisnerAmper Accountants & Advisors

- <http://eisneramper.com/special-fundraising-events.aspx>
- In addition to the information on the page, you can download a 17-page PowerPoint file entitled: **“Special Events | What You Need to Know”**

FundraisingIP.com

This link will take you to their page entitled: **“Accounting For Fundraising Efforts: Keeping Good Fundraising Records”**

- <http://www.fundraisingip.com/fundraising/accounting-for-fundraising-efforts-keeping-good-fundraising-records/>

Nonprofit Accounting Basic\$

Greater Washington Society of CPAs Educational Foundation

- <http://www.nonprofitaccountingbasics.org/nonprofit-specific-bookkeeping-accounting/accounting-fundraising-under-gaap>
- <http://www.nonprofitaccountingbasics.org/nonprofit-specific-bookkeeping-accounting/special-events/accounting-special-events>

NonProfit World...user-friendly services for nonprofits

- <http://non-profit-world.com/2010-09-03/>

About McConnell & Jones

McConnell & Jones LLP is a public accounting firm providing a full spectrum of audit, tax and advisory services that effectively assists governmental and nonprofit organizations in dealing with operational and accountability matters. Our experienced auditors, accountants, and business consultants have a deep understanding of the unique business and operational challenges faced by these entities and are skilled in working with a variety of nonprofits including charities, foundations, faith-based organizations, educational institutions and governmental agencies.

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