LIVE UNITED™ United Way

United Way's 2011-2012 Executive Financial Education Series

REVISED SCHEDULE

WHAT: A series of 6 financial education seminars, sponsored by United Way and 6 local accounting firms

FOR WHOM: Exclusively for United Way partner agencies' chief executive officer, chief financial officer and appropriate board member (space is limited to 3 representatives per agency per session)

WHEN: 11:30 a.m. – 1 p.m., includes lunch

WHERE: United Way Board Room, 1500 N. Main Street, Suite 200, Fort Worth, TX 76164

RSVP: Victoria.walton@unitedwaytarrant.org or (817) 258-8051 by deadline specified for each.
(For each reservation, provide agency name, plus name and title of each individual attending).

CPE hours will be issued for each session.
Learning Objectives: To expand corporate knowledge on each topic.
No Prerequisites

DATE	SESSION	PRESENTED BY
September 26, 2011 **Reserve by September 21**	Budgeting and Cash Flow Forecasting	Paul Kelsey – Hartman Leito & Bolt, LLP Courtney Gregory – Presbyterian Night Shelter
November 10, 2011 **Reserve by November 7**	Not-for-Profit Financial Statements-The Basics	Amy Michie & Kim Crawford – Sutton Frost Cary, LLP
January 10, 2012 **Reserve by January 6**	Investment Management and Governance	Brian Jenke – Sanford Baumeister & Frazier, LLP
March 07, 2012 **Reserve by March 02**	Fraud Awareness & Internal Controls	Donna Mayes – Rylander Clay & Opitz, LLP
April 26, 2012 **Reserve by April 23**	Basics of 990, IRS Exams and Third Party Ratings	Daniel Stewart – Weaver, LLP
May 17, 2012 **Reserve by May 14**	Topics to be suggested during the year	Panel of CPA's – Facilitator: Karanae Barrey, CPA - Whitley Penn, LLP

Co-Sponsors:

HLB Hartman Leito & Bolt, LLP Accountants and Consultants

RCO Rylander, Clay & Opitz, LLP Certified Public Accountants Smart Solutions Real Results

SBF Sanford Baumeister & Frazier, PLLC Certified Public Accountants and Consultants

Sutton Frost Cary LLP A Limited Liability Partnership Certified Public Accountants and Consultants

weaver

WHITLEY WP PENN LLP CPAs & Professional Consultants