

**28th Annual**  
**“THIS YEAR IN NONPROFIT LAW”**

**8:30 a.m. – 3:45 p.m.**

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- 8:30 a.m. Arrival, registration, and breakfast  
9:00 a.m. Welcome  
**Donald W. Kramer**, Chair, Nonprofit Law Group, Montgomery McCracken  
Editor, *Nonprofit Issues*<sup>®</sup>
- 9:15 a.m. "This Year In Nonprofit Law"  
**Karl E. Emerson**, Montgomery McCracken  
**Catherine H. Gillespie**, Montgomery McCracken  
**Donald W. Kramer**, Montgomery McCracken  
**Clifford Scott Meyer**, Montgomery McCracken  
**John M. Myers**, Montgomery McCracken  
**Stephen G. Rhoads**, Montgomery McCracken  
**Mara I. Smith**, Montgomery McCracken
- 10:45 a.m. Mission-Aligned Investing  
**Sidney Hargro**, Executive Director of Philanthropy Network Greater  
Philadelphia
- 12:00 p.m. LUNCH
- 1:00 p.m. *Breakout Sessions*  
Critical Policies for Nonprofits: Conflict of Interest, Whistleblower, Document  
Retention, Confidentiality, Gift Acceptance, and Public Policy  
**Catherine H. Gillespie**, Montgomery McCracken  
**Donald W. Kramer**, Montgomery McCracken  
**William W. Keffer**, Montgomery McCracken  
**Stephen G. Rhoads**, Montgomery McCracken
- Employment Law Update  
**William K. Kennedy**, Montgomery McCracken  
**Renee Nunley Smith**, Montgomery McCracken
- 2:30 p.m. *Breakout Sessions*  
Ethical Issues for Nonprofit Lawyers and Executives  
**Stephanie K. Benecchi**, Montgomery McCracken  
**Catherine H. Gillespie**, Montgomery McCracken  
**Donald W. Kramer**, Montgomery McCracken  
**Clifford Scot Meyer**, Montgomery McCracken  
**John M. Myers**, Montgomery McCracken
- Protecting Your Intellectual Property and Cyber Security  
**Shawn S. Li**, Ph.D., Montgomery McCracken  
**Richard L. Moss**, Montgomery McCracken

## Speaker Bios

**Sidney Hargro** is a philanthropy strategist, speaker, and advocate for reimagining approaches to sustainable social change. Hargro became the Executive Director of Philanthropy Network Greater Philadelphia in July 2017. Philanthropy Network supports funders and social investors in greater Philadelphia as a hub for learning, knowledge-sharing, and partnership. Philanthropy Network works to integrate policy, equity, and social innovation in philanthropy to help to increase regional impact.

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**Stephanie K. Benecchi** is an associate in the firm's Litigation Department. Stephanie's practice focuses on commercial litigation, including class action defense, as well as white collar defense and government investigations. Stephanie has experience with litigation matters at all stages, from pre-suit investigations through resolution and settlement.

**Catherine H. Gillespie** serves as of counsel in the firm's Nonprofit Law group. She focuses on higher education law, health care, and corporate and tax law issues generally affecting nonprofit and tax-exempt organizations.

**William W. Keffer** is the co-chairman of the Business Succession Planning group. He serves as outside general counsel to nonprofit and for-profit companies in connection with their general operations, structure, governance, compliance, mergers, acquisitions and succession planning. Bill represents a number of family owned and nonprofit businesses involved in the fields of education, camping and athletics.

**William K. Kennedy** is vice-chair of the firm's Labor and Employment practice. For his entire career, Bill's practice has been devoted to representing management in employment-related litigation; legal advice, training, and policy development concerning labor and personnel issues; and labor arbitrations, collective bargaining negotiations, and unfair labor practice disputes.

**Donald W. Kramer** serves as chair of Montgomery McCracken's Nonprofit practice group. Don has more than 40 years of experience dealing with the concerns of nonprofit organizations, not only as a lawyer, but also as a teacher, writer, publisher and board member. He has worked with nonprofits of all types and sizes, helping structure startup situations and restructure multiorganizational health and educational systems. He counsels on a wide range of nonprofit corporate structure and governance, private and community foundations, continuing care retirement communities, exempt organization taxation, low-income housing tax credit transactions, real estate, charitable giving and other nonprofit issues. Don serves as the editor and publisher of Don Kramer's Nonprofit Issues®, a national newsletter of "Nonprofit Law You Need to Know," which he founded in 1989.

**Shawn S. Li** is a partner and member of the firm's Intellectual Property Department. He has developed global protection strategies, drafted and prosecuted U.S. and international patent applications, prosecuted patent reexaminations and negotiated and prepared complex licenses and related agreements.

**Clifford Scott Meyer** diverse practice includes financial and tax Monte Carlo modeling of sophisticated transactions, domestic asset protection, tax reformation of instruments and

transactions, closely held business succession planning, technical support for planned giving departments of major institutions and individual tax planning.

**Richard L. Moss** serves as of counsel in Montgomery McCracken's Intellectual Property Department. He focuses his practice on U.S. and foreign patent prosecution matters in electrical, electromechanical, general mechanical, medical device, computer software, and process technology areas.

**John M. Myers** is chair of the firm's Higher Education practice group. John has more than 35 years of experience in complex commercial litigation, including as chief deputy city solicitor, Special Litigation, for the City of Philadelphia. John's experience includes partnership and closely held business claims and disputes, and claims involving employment, real estate, lender liability, joint venture issues, securities industry disputes, contract negotiation, and general business counsel including contractual and employment matters.

**Stephen G. Rhoads** is a partner in the firm's Litigation Department. He concentrates his practice in the areas of professional and general liability defense, construction disputes, commercial litigation, and advising educational and non-profit institutions on risk-management.

**Mara I. Smith** is an associate in the firm's Litigation Department. Prior to joining Montgomery McCracken, Mara served as a law clerk for the Honorable Lynne A. Sitarski in the United States District Court, Eastern District of Pennsylvania. She also served as a legal extern in the Office of General Counsel at Thomas Jefferson University Hospitals. During her time there, she reviewed contracts, conducted legal research and investigated HIPAA breaches. In addition, Mara previously worked for the Eviction Defense Collaborative in San Francisco, where she provided legal rental assistance for low-income tenants.

**Renee Nunley Smith** serves as Of Counsel in the firm's Litigation Department and is a member of the Labor and Employment practice. Renee represents national, regional, and local employers in employment litigation involving claims under federal and state law. Her practice also focuses on counseling employers on a wide range of employment issues and conducting workplace investigations.