

2018 Nonprofit Appreciation Day

11:30 AM – 12:30 PM

Registration, Lunch and Networking

12:30 PM – 12:45 PM

Welcome, Introductions

12:45 PM – 1:35 PM

Art of the Ask, Bruce Berglund, CFRE

1:35 PM – 2:25 PM

Leading Effective Nonprofit Change Through
Engaged Leadership, Michelle A. Turman, MA, CFRE

2:25 PM – 2:50 PM

Break / Networking

2:50 PM – 3:40 PM

Nonprofit and For Profit Tax Update, James O'Connor, CPA
& Michael Helton, CPA

3:40 PM – 4:30 PM

Nonprofit Accounting Update, Maureen G. Butler, PhD, CPA





Bruce Berglund, CFRE



For nearly 30 years, Bruce Berglund has been a successful professional fundraiser in the fields of higher education, arts and culture, and social services.

Bruce is the founder and President of Donor by Design Group, a national firm providing comprehensive fundraising services to nonprofits, churches, community colleges and schools. Donor By Design is currently managing more than \$3 Billion in capital, annual and endowment campaigns. Bruce is a highly sought- after writer, speaker and teacher.

Prior to joining Donor By Design, Bruce served as national Director of Philanthropy and Resource Development for the YMCA of the USA. In addition, Bruce served local YMCAs in St. Louis and Milwaukee as the Chief Development Officer. He was also a founding member of Crossroads Church in St. Louis, MN.

He also served as the Chief Development Officer for the Saint Louis Art Museum and Director of Advancement for Doane College. Bruce served as a member of the Buehler YMCA board of directors, has served on the North American YMCA Development Organization (NAYDO) Council and is a member of the Association of Fundraising Professionals (AFP).

Bruce holds a BA from Doane College, where he majored in communication and human relations, and a MA in Management from Webster University.

Bruce and his family live in the Chicago area.



Michelle Turman, MA, CFRE



FACILITATING POSITIVE CHANGE FOR YOUR ORGANIZATION™

Michelle Turman, MA, CFRE is the CEO of Catalyst Consulting Services whose mission is to facilitate positive change in the areas of executive searches, organizational management, and fundraising. With over twenty-four years of nonprofit experience, Michelle established Catalyst Consulting Services and has been responsible for increasing the impact and best practices of nonprofit organizations she serves and has raised over \$60 million for the Tampa Bay community through her professional and personal philanthropic efforts.

Turman is author of the best-selling book, *Jumping the Queue – Achieving Great Things Before You Are Ready* which focuses on how young professionals can seize personal and professional opportunities, achieve great things, and get what they want and deserve. Turman is a Key Partner and educational trainer for the Nonprofit Leadership Center of Tampa Bay and at the Edyth Bush Institute for Philanthropy & Nonprofit Leadership at Rollins College. She is a Certified Fund Raising Executive and specializes in professional education in the areas of change management, capital campaigns, volunteer management, board governance, and fund development.

Turman has been featured in *American Express: Open Forum*, *Arizona Business Magazine*, *Inc.com*, *Inc. Asian*, *New York Daily News*, *Investors Business Daily*, *Nerdy Girls Express*, *Young Upstarts*, and *Rural Messenger* as an expert and author for her focus on change management in the workforce. In 2015, Turman was recognized by *Tampa Bay Metro Magazine* as one of Tampa Bay's Distinguished Women in Business and the Face of Nonprofit Change in 2016 and been nominated by *Tampa Bay Business Journal* as Business Woman of the Year in 2007, 2016 and 2017.



Michael E. Helton, CPA



Michael E. Helton graduated from Shawnee State University (Ohio) in 1995. While at Shawnee State, Mr. Helton was a member of the men's basketball team while earning his Bachelor's degree in Business Administration. Mr. Helton obtained his CPA license in the State of Kentucky shortly thereafter. Prior to joining Rivero, Gordimer & Company in September 1999, he served as a tax consultant with a Florida regional firm and a local firm in Ashland, Kentucky.

Mr. Helton's areas of concentration include tax preparation, planning and consultation for individuals, businesses, estates and trusts, including estate planning and administration and other tax related topics. Alongside significant experience with medical professionals and the construction, real estate development and rent-to-own industries, he also practices in business owner succession planning, dissenting shareholder disputes, general financial and operational consulting, and representation of clients before the Internal Revenue Service.

Mr. Helton is a member of the American Institute of Certified Public Accountants, Florida Institute of Certified Public Accountants and the State of Florida Board of Accountancy. He is a member of the Tampa Bay Estate Planning Council, a Certified Specialist in Estate Planning by the National Institute for Excellence in Professional Education, LLC and is also a past board member of Tampa Connection, a non-profit leadership development organization.



James K. O'Connor, CPA



James K. O'Connor is a 1999 graduate of Florida State University where he earned a Bachelor of Science in Accounting and his Masters of Accountancy with an emphasis in Taxation. While at Florida State University, Mr. O'Connor was a member of Sigma Pi Fraternity and the Accounting Society. Prior to joining Rivero, Gordimer & Company in 2002, he served as a staff accountant with a local firm in North Palm Beach, Florida.

Mr. O'Connor has extensive background and experience in the not-for-profit sector. Working with various tax exempt entities, he has dealt with many topics including private inurement, tax exempt financing, unrelated business income and proper reporting on information returns.

Mr. O'Connor also has experience in tax preparation, planning and consultation for individual and closely held businesses, QuickBooks Pro accounting systems consulting, sales tax resolution issues, and representation of clients before the Internal Revenue Service.

Mr. O'Connor is currently a member of the American Institute of Certified Public Accountants and Florida Institute of Certified Public Accountants.



Maureen G. Butler, PhD, CPA



Maureen Butler is an Associate Professor of Accounting at The University of Tampa(UT) and a CPA licensed in Florida and Virginia. Her teaching areas include Managerial Accounting, Cost Accounting and Government and Not-for-Profit Accounting. She also teaches Financial Management in the graduate level UT Nonprofit Management Certificate program. With her husband, Brian Butler, Maureen has also co-taught "Using the Form 990 to Tell Your Nonprofit's Story" at the Nonprofit Leadership Center in Tampa and at the Association of Fundraising Professionals Florida Caucus 2013 Planet Philanthropy. Their article "Telling the not-for-profit story through Form 990" appeared in the December 2016 issue of the Journal of Accountancy.

Mrs. Butler is a former member and treasurer of the Nonprofit Leadership Center board of directors. Prior to entering academia, Maureen served as a Finance Officer in the U.S. Army, volunteered with military families and worked in corporate and public accounting.