

Thursday June 28, 2018 2:30-4:30



LIVE: The Bonadio Group  
171 Sully's Trail, Pittsford, New York 14534

or, Via HFMA Webinar

**2 hours of CPE will be offered!**



The Robert M. Shelton  
Award for Sustained  
Chapter Excellence  
*2015-2016 recipient*

The focus of this training session will be an overview of Form 990 and the most common schedules (A, B, C, D & O), including how to prepare a complete and concise return including governance, compensation, and tax exempt bond reporting considerations. We will also focus on Schedule H reporting specifically required for Hospital entities, and discuss current updates.

**This educational event is offered in both a group live format, hosted by The Bonadio Group in Pittsford, NY, and via webinar.**

- **Click here to register for the live event:**  
<https://rochesterhfma.starchapter.com/meet-reg1.php?id=64>
- **Click here to register for the webinar:**  
<https://attendee.gotowebinar.com/register/759031750802758659>

### About our Speakers

**Jonathan Miller, CPA** is a Partner with the Bonadio Group with a primary focus on Tax-Exempt Organizations. Annually Jonathan provides oversight in the preparation and / or review of over 50 Federal Form 990/990ez. In addition, Jonathan assists his client's governance members execute their fiduciary duties through presenting the Form 990/990ez to them in lay terms.

**Bridget Kehm, Esq.** is an attorney in the Law Offices of Pullano & Farrow PLLC's Corporate and Health Care Practice Groups, where she provides counsel to not-for-profit organizations, tax-exempt entities, and health care providers on a variety of matters, including governance and compliance with state and federal tax-exemption requirements.





### **CPE Information**

2.0 Continuing Professional Education (CPE) credits will be granted for attendance in specialized knowledge

**Program Level:** Basic

**Instructional Delivery Method:** Group live

**Objective:** To educate on Form 990 reporting requirements specific to healthcare organizations

**After this course you will have a basic understanding of:**

- Requirements of Federal Form 990 and its various schedules
- Best practices to complete and accurate 990 and the required schedules.

**Complaint Policy—** For each program, HFMA will provide the contact information for the presenters and reviewers and communicate all questions, concerns, or complaints be directed here. HFMA will reply to all such communications in a timely fashion. For more information regarding administrative policies such as complaints, please contact our HFMA.org

If the event must be canceled, HFMA will notify all registered participants as soon as cancellation is known by emailing the address registered. HFMA will also put a notice of cancellation on its website for courses offered to outside participants.

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