



COMMUNITY FOUNDATION LEGAL ISSUES DEEP DIVE DAY WEDNESDAY, NOVEMBER 9, 2016

Presenters

Joshua W. Abel, Associate, Faegre Baker Daniels - Josh focuses his practice on nonprofit



organizations where he advises nonprofits on matters related to seeking and maintaining tax-exempt status, governance and general corporate matters. Before joining Faegre Baker Daniels, Josh was executive director of the Neighborhood Christian Legal Clinic in Indianapolis. He provided pro bono legal assistance in central and northern Indiana. The clinic, which employs a staff of 40 people and operates on a \$2 million annual budget, doubled its growth under Josh's leadership. Each year, the Neighborhood Christian Legal Clinic serves more than 10,000 people.

Prior to assuming the executive director role at the Neighborhood Christian Legal Clinic, Josh served as its managing attorney, overseeing 20 people and coordinating the clinic's AmeriCorps VISTA federal contract. He started at the clinic upon graduation from law school as a staff attorney focusing primarily in bankruptcy and family law matters. Before attending law school, Josh spent one year as a staff member with Campus Crusade for Christ (now Cru).

Joseph E. Miller, Partner, Faegre Baker Daniels - Joe, leader of the firm's nonprofit organizations



group, devotes the greatest portion of his practice to the representation of organizations exempt from federal and state income taxes. His expertise includes nonprofit corporate governance, charitable giving issues, international engagements by tax-exempt organizations, the use of subsidiary and affiliated organizations, and the development of organizational and operational strategies for public-private partnerships. Joe has significant experience in international grantmaking for private foundations and public charities, including the creation of numerous nonprofit organizations engaged in international charitable activities and/or grantmaking.

Joe regularly speaks on current legal topics to nonprofit executives and professional advisors. He also serves as an adjunct professor at Taylor University, teaching courses on legal studies and international law. Before joining Faegre Baker Daniels in 1995, Joe served in the administration at Taylor University in financial aid and student development.

Jennifer M. Oertel, Partner, Jaffe Raitt Heuer & Weiss P.C. - Jennifer is coordinator of the firm's



Not-for-Profit Practice Group where she represents large family foundations, public charities and social enterprise funds located across the nation. Jennifer is also a member of the Privacy and Datasecurity Practice Group. She also works in the areas of corporate law and finance, in which she has had over 16 years of experience in representing start-up and emerging growth companies as well as large public companies advising on matters of general corporate law, public and private offerings, securities regulations, and mergers and acquisitions. She also has experience in business consulting to franchisors.

Jennifer holds a certificate in nonprofit management from Georgetown University. She earned her Bachelor's degree with highest honors from the Michigan State University Honors College and is a graduate of Northeastern University School of Law where she earned several awards for academic excellence.

Philip M. Purcell JD, Vice-President for Planned Giving and Endowment Stewardship,



Ball State University Foundation - Phil is the Vice President for Planned Giving and Endowment Stewardship, Ball State University Foundation; Adjunct Faculty, Indiana University Maurer School of Law and Lilly School of Philanthropy. In addition, Phil teaches courses on Law and Philanthropy, Nonprofit and Tax Exempt Organization Law and Planned Giving as adjunct faculty for the Indiana University Maurer School of Law (Bloomington) and Indiana University Lilly School of Philanthropy and Fundraising School (Indianapolis). Phil serves as a member of the Tax Exempt Organization Advisory Council for the Internal

Revenue Service (Great Lakes states) and has served on the board of directors for the Partnership for Philanthropic Planning and Association of Fundraising Professionals Indiana. He is an attorney and member of the American and Indiana State Bar Associations. Phil received his B.A. degree from Wabash College and his J.D. and M.P.A. degrees from Indiana University.

Amie L. Vanover, Partner, Thompson Hine LLP - Amie focuses her practice on estate and tax



planning, including advising tax-exempt organizations, philanthropic planning, and estate and trust administration. She received her Estate Planning Certification from the Institute of Continuing Legal Education and the Probate & Estate Planning Section of the State Bar of Michigan. The certification demonstrates her in-depth study of estate planning and administration including: estate tax returns, post-death tax plans, trusts, contested proceedings, and other areas.

Amie received her B.A. from Capital University and her Juris Doctor from The Ohio State University Michael E. Moritz College of Law. Amie was selected for inclusion in 2015 and 2016 *Ohio Super Lawyers*® as a Rising Star and also named a "Top Lawyer 2015" by Columbus CEO. She was a member of the *Business First*, Forty Under 40, Class of 2011, and is a 2009 graduate of Leadership Columbus. She is the Immediate Past President and a Director of the Central Ohio Planned Giving Council and a member of Partnership for Philanthropic Planning and the Columbus Estate Planning Council.