

Calendar of Events

April 25, 2024

Leveraging ABLE Accounts for Eligible Individuals with Disabilities Overview and Updates on

12:00 PM - 01:15 PM EST

This session will be held in conjunction with the NCVSCPA annual chapter meeting. We will start promptly at noon to elect our 2024-2025 Board Members. This should be approximately 10-15 minutes. The session begins immediately following the annual meeting and will run the normal 60 minutes for 1 CPE credit.

The Achieving a Better Life Experience (ABLE) Act offers more than eight million Americans with disabilities and their families the ability to establish a tax-advantaged ABLE savings account without fear of losing eligibility for certain public benefits, including Medicaid and Supplemental Security Income (SSI) payments.

Attend this session to separate fact from fiction and understand how ABLE accounts work. We'll review ABLE basics and provide updates on Virginia's direct-sold ABLEnow program and advisor-sold ABLEAmerica program.

Learning objectives:

Increase knowledge of the components of ABLE accounts and how they can support the financial needs of individuals with disabilities and their families

Understand the current status of ABLE accounts and opportunities to maximize their benefits

Incorporate ABLE accounts into your planning to enhance quality of life related to employment, education and community integration in both the short and long term.

Presenter Bio

Brittany Bullock joined Virginia529 in 2013 as a Financial Operations Analyst. Since then, she has moved into the role of Relationship Marketing Specialist, spending most of her time traveling the Central and Tidewater regions of the state educating individuals and families on the importance of ABLE accounts and how empowering they are for people with disabilities. As part of the marketing team, she also conducts virtual events and webinars both statewide and nationwide. Brittany has a B.S. in Business from Virginia Commonwealth University, with a concentration in International Business. She is passionate about helping others and looks forward to sharing this wonderful information with you all.

May 22, 2024

Creative Uses of 501(c)(4) Organizations: Philanthropy, Policy, Investments and Beyond (NF

09:00 AM - 10:00 AM EST

After a quick grounding in 501(c)(4) basics, the presentation will cover cutting-edge uses of 501(c)(4)s emerging in the nonprofit sector, including Patagonia and the "special purpose trust", impact investment funds, "charitable" 501(c)(4) activities, maximizing impact in policy and politics, and the use of 501(c)(4)s in affiliated entity structures.

Title: Creative Uses of 501(c) for Organizations

Time: 9:00am Wednesday, May 22nd

Delivery: Live Virtual Webinar

Benefit: 1 CPE credit

Cost: Free for members; nonmember guests pay \$25

Bio: Bridget M. Weiss represents tax-exempt organizations, including charities, private foundations, advocacy organizations, trade associations, medical research organizations and international nongovernmental organizations. She has experience advising tax-exempt organizations in a wide variety of contexts throughout their entire lifecycle—from initial qualification for tax-exempt status to ongoing operations, including implementation of complex programs, grantmaking, lobbying, and political activities and business activities. Ms. Weiss counsels tax-exempt organizations and their governing bodies facing tax and governance controversies, including both internal investigations and audits and other examinations by the Internal Revenue Service (IRS) and other government regulators. She also represents individuals and corporate donors on major gifts and other charitable programs.