NYCPA Rochester Non-Profit Insights 2025: Navigating the Future

Join us on May 20th, 2025 from 8am to 1pm at the Rochester Museum and Science Center Eisenhart Auditorium.

ITINERARY:

8:00 to 8:25am
Arrive and get settled. Refreshments and pastries will be available

8:25 to 8:30am
Opening Remarks, Haley Henning

8:30 to 9:00am
General Nonprofit Topic Overview, Haley Henning and Caitlin Langmead

9:00 to 9:45am
Duty, Dos, and Don'ts of Investments, Sandra Kobel

9:45 to 10:15am
Brunch – Full buffet will be served

10:15 to 11:15am
Legislative Update, Jess LeDonne

11:15 to 11:45am
Employee Benefits, Jeff Nagel

11:45 to 12:00pm
Break

12:00 to 1:00pm
Succession Planning, Stephanie Reh

OUR SPEAKERS:

Haley Henning, CPA
Audit Supervisor at 1RDG the financial center and Chair of the NYCPA Rochester Chapter's Nonprofit Committee

Caitlin Langmead, CPA
Principal at MMB + CO and Member of the NYCPA Rochester Chapter's Nonprofit Committee

Sandra L. Kobel, CFP®, CLU®, ChFC®
Kobel Financial Planning

Jess LeDonne, JD
Director at the Bonadio Group

Jeff Nagel, MBA, RHU, REBC
Senior Director of Benefits at 1RDG the financial center

Stephanie Reh
Director of HR at Durst Image Technology US, LLC

OUR REGISTRATION:

In-Person:
Link: https://cpe.nysscpa.org/product/35962
Price: $30, $5 discount for NYCPA members

Webinar:
Link: https://cpe.nysscpa.org/product/35963
Price: $25, $5 discount for NYCPA members

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Brunch Sponsor

SPEAKER BIOGRAPHIES & SESSION INFORMATION:

Haley Henning, CPA

- **Bio**: As head of 1RDG's nonprofit practice, Haley works extensively with nonprofit clients, primarily performing audits and preparing informational returns. Haley is also actively involved in the local nonprofit community, including her roles as Chair of the NYCPA Rochester Chapter's Nonprofit Committee, Board Treasurer of PUSH Physical Theatre, and Board Secretary of the Mental Health Association of Rochester/Monroe County.
- **Session Info**: Haley and Caitlin will touch on best practices and general nonprofit topics such as revenue recognition, the Form 990 and CHAR500, and resources available for nonprofit organizations.

Caitlin Langmead, CPA

- **Bio**: Caitlin is a Principal at MMB + CO, bringing over 12 years of experience serving assurance clients, including not-for-profit organizations. In her current role, Caitlin leads the firm's efforts in implementing new auditing and accounting standards and facilitating firm training sessions. Caitlin is also actively involved in volunteering for local nonprofits, including her role as Board Treasurer at Canandaigua Montessori School and her work with the Colony Caregivers.
- **Session Info**: Caitlin and Haley will touch on best practices and general nonprofit topics such as revenue recognition, the Form 990 and CHAR500, and resources available for nonprofit organizations.

Sandra L. Kobel, CFP®, CLU®, ChFC®

- **Bio**: Sandra L. Kobel, CFP®, CLU® ChFC® has an extensive background as a financial advisor, including working for a major insurance company, an international bank and a 70-person CPA firm. She is currently an independent investment advisor. Her experience includes structuring investment accounts as well as providing wealth management services. Sandra is also actively involved in charity and nonprofit work, with a focus on helping inner-city children in Upstate New York.
- **Session Info**: Sandra L. Kobel, CFP®, CLU® ChFC® is an independent investment advisor who has spent her career providing investment and planning advice. Her session will focus on key responsibilities and actions that small nonprofits should be aware of relative to investments, including fiduciary responsibilities and how to start and evaluate an investment.

Jess LeDonne, JD

- **Bio**: As The Bonadio Group's Director of Tax Technical, Jess is a key resource on tax legislation, guidance, and policy developments impacting our clients. She oversees specialized tax teams, ensuring innovative and practical solutions, as well as monitoring legislative changes to provide clear, actionable insights for informed decision-making. Jess holds a B.A. from the University of Notre Dame and a J.D. from Chapman University School of Law. With deep expertise in tax, compliance, and policy consulting since 2012, Jess leads thought leadership initiatives and spearheads tax education programs for internal teams and clients.
- **Session Info**: In this session, Jess will provide an overview of recent and anticipated legislative and regulatory changes impacting nonprofit organizations. Key topics will include updates on the status of federal legislation affecting nonprofits, including changes that may occur under the new administration, and insights into policy shifts and deregulation and their implications for nonprofit operations and strategic planning.

SPEAKER BIOGRAPHIES & SESSION INFORMATION:

Jeff Nagel, MBA, RHU, REBC

- **Bio**: Jeff is the Senior Director of Benefits at 1RDG with over 25 years of experience in the Employee Benefits field. He holds both the Registered Health Underwriter and Registered Employee Benefits Consultant certifications, along with an MBA from the State University of New York at Buffalo. Jeff is passionate about partnering with employer clients to create and implement comprehensive, high-quality benefits packages while effectively managing rising costs. He has a rare talent for explaining complex benefits concepts to employees in a clear and accessible way. Outside of his professional life, Jeff actively participates in industry associations and enjoys volunteering as a youth sports coach.
- **Session Info**: In this session, Jeff will address the rising costs of medical insurance and explore the available options for small and midsize businesses. He will also review additional benefit opportunities that can enhance your employees' total compensation package, going beyond just wages to offer more value.

Stephanie Reh

- **Bio**: Stephanie Reh created and implemented her succession planning approach as an executive in a nonprofit, human services organization, where she intentionally developed her own successors. When they were ready to assume her responsibilities, Stephanie left the organization and enhanced the process as an organizational development and business strategy consultant, helping non-profit clients to establish succession planning in their organizations. Since then, she has presented on this topic to multiple audiences, including several sessions for the NY Alliance for Inclusion & Innovation, a non-profit membership association focused on supporting individuals with intellectual, developmental and other disabilities. Currently, Stephanie is the Director of Human Resources at Durst Image Technology US, where she personally meets with all interested employees and their supervisors to facilitate creation of their individual development plans. Stephanie also lends her organizational development expertise as President of the Board of Directors for PUSH Physical Theatre.
- **Session Info**: Having robust leadership succession plans in place doesn’t just reduce risk in the event of an unplanned transition of a key leadership position. When done right, it can also increase retention of the organization’s best staff by providing tailored plans for leadership development that tie directly to future growth opportunities within the organization. Steph’s presentation details the two-step process to identify potential successors and then create individual development plans to accelerate their readiness. Participants will also learn how to communicate the succession planning and individual development processes to employees such that they get excited about the opportunity to develop themselves. The transparent communication approach includes and engages all interested employees - whether or not they are on a succession plan…yet.