



TAX-EXEMPT ORGANIZATIONS

When it comes to providing a wide range of legal services to all types of tax-exempt organizations, Conner & Winters has some of the most knowledgeable and experienced attorneys in the region. We help our clients navigate through the complex federal and state tax rules and the common law of charities.

Whether an individual desires to leave a charitable legacy or an institution needs advice on governance or tax issues, we can provide the answers. Our clients include:

- Private foundations
- Publicly supported charities
- Support organizations
- Museums
- Educational institutions
- Religious organizations
- Political organizations
- Hospitals
- Donor advised funds
- Civic groups
- Social welfare organizations
- Professional societies
- Trade associations

The firm's practice includes providing our tax-exempt clients with a full array of legal services, including:

ATTORNEYS

Katherine G. Coyle
William E. Foster
Allison McGrath Gardner
David J. Looby
Douglas M. Selwyn
Martin R. Wing

RELATED PRACTICES

Employee Benefit Plan
Design and
Administration
Health Care
Income Tax
Insurance
Labor and Employment
Litigation
Real Estate
State and Local Tax
Tax
Wills, Trusts and Estates

INDUSTRIES

Indian Country Business
and Finance

Tax-Exempt Organizations

- Selecting an appropriate vehicle and forming a tax-exempt organization, including nonprofit corporations and charitable trusts
- Securing tax-exempt status
- Structuring charitable gifts and bequests
- Counseling regarding private inurement and private benefit doctrines
- Advising on governance issues, such as fiduciary duties, conflicts of interest policies, and advice on director and officer liability, responsibility, and insurance
- Identifying unrelated business taxable income issues
- Guiding legislative and political campaign activity
- Explaining annual distribution requirements
- Assisting with gift substantiation requirements
- Advising on investment issues
- Forming and managing endowment funds
- Advising on all aspects of real estate transactions
- Assisting with Internal Revenue Service audits
- Interpreting the Pension Protection Act of 2006
- Supporting international grantmaking
- Forming and using exempt and for-profit subsidiaries
- Structuring joint ventures with for-profit and other tax-exempt entities
- Drafting employment and independent contractor agreements and consulting regarding hiring and termination decisions, in collaboration with our labor and employment attorneys
- Assistance regarding employee benefits and executive compensation arrangements and consultation regarding hiring and termination decisions
- Terminating private foundation status
- Compliance with intermediate sanctions regulations
- Compliance with private foundation requirements
- Representing major lenders and major creditors in Chapter 11 bankruptcies of nonprofit health care businesses
- Working on agreed and hostile takeovers of nonprofits
- Implementing our clients' unique objectives

Tax-Exempt Organizations

Conner & Winters attorneys are dedicated, responsive, and thorough in providing advice and in assisting clients in realizing their individual charitable goals. We offer comprehensive tax legal services and are experienced in representing tax-exempt organizations with matters before the Internal Revenue Service, Oklahoma Attorney General, and Oklahoma probate and civil courts. In addition, one of our attorneys serves as general counsel for nonprofit corporations.

Our firm also provides tax-exempt organizations with general legal services not unique to charitable foundations in areas such as labor and employment, wills, trusts and estates, health care, real estate, church and nonprofit organizations benefit planning, employee benefit plan design and administration, insurance, and litigation.

Publications & Events

Employment Law for Ministries: Whistleblowing and Ministries
10.14.2020

News

30th Edition of Best Lawyers® Recognizes 67 Attorneys from Conner & Winters
08.18.2023