

# BROWN & STREZA

## ATTORNEYS AT LAW

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### Casey S. Hale

PARTNER

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#### RELATED PRACTICES

Philanthropist Representation  
Religious Institutions  
Nonprofit Organizations



#### BIO

Casey Hale is a partner with the Orange County, California law firm of Brown & Streza, LLP. He serves as legal counsel to private foundations, churches and religious organizations, charitable organizations, supporting organizations, and hybrid organizations advising them on the unique legal, corporate, and tax issues they face.

Casey's representation includes, among other things, legal counsel regarding organizational governance matters, structuring and operating subsidiaries and joint ventures, international grantmaking and operations, intellectual property matters, executive compensation/intermediate sanctions (including minister compensation), unrelated business taxable income, and property tax exemption issues.

With respect to hybrid organizations, in 2009, Casey established the first L3C under Wyoming law.

In 2009 - 2012, Casey was named a "Southern California SuperLawyers-Rising Star" by *Los Angeles Magazine* – a distinction recognizing just 2.5% of attorneys under age 40 for excellence in the practice of law.

Casey also serves on the Board of Directors of Enlace USA. Enlace USA equips local churches in El Salvador, Guatemala, Nicaragua, and Nepal to become leaders in their communities and to collaborate with the local community to build enduring solutions to poverty.

Casey received his undergraduate degree from Vanguard University of Southern California and attended Whittier Law School on a merit scholarship where he earned a Juris Doctorate.

## PROFESSIONAL BACKGROUND

Casey earned his J.D. from Whittier Law School.

Before pursuing a law degree, he served in the United States Army as a Russian linguist.

Casey completed his undergraduate work at Vanguard University of Southern California majoring in Cultural Anthropology with a concentration in Archeology. He has worked on archeological projects in Israel at Tel Dor; in Hawai'i at Koloko-Honokahou National Historic Park and The John Young Homestead at Pu'ukohola Heiau; and in Orange County, California on Gabrieliño (Tongva) and Juaneño (Acjachemen) sites at Crystal Cove, Newport Coast, and Huntington Beach.

Casey was a Professor at Concordia University Irvine, where he developed and taught the Legal Aspects of Managing a Nonprofit Organization course as a part of the university's undergraduate degree program in Nonprofit Leadership.

## PROFESSIONAL RECOGNITION

### 2009 - 2012 "Southern California SuperLawyers - Rising Star"

Published by *Los Angeles* magazine and *The Journal for Law & Politics*. Only 2.5% of lawyers under the age of 40 and/or in their first 10 years of practice in Los Angeles and Orange Counties receive this honor.

## PUBLICATIONS

### White Paper – January 2008

New Regulations Will Govern Type III Supporting Organizations in 2008

## SPEAKING ENGAGEMENTS & TEACHING

### The Nonprofit Partnership, Live Interactive Webinar, May 23, 2023

Nonprofits Risk Management | Insurance and the Law

### First American Trust, Santa Ana, California, May 4 and 5, 2023

Philanthropic Strategies for Successful Families

### Strafford Continuing Education Webinars Panelist, Live Interactive Webinar, January 12, 2021

Establishing a Private Foundation and Reporting Requirements

### The Nonprofit Partnership – Lunch & Learn, Long Beach, California, November 21, 2019

Risk Management of Volunteers

### Capstone Class at Cromwell School of Business, Biola University, La Mirada, California, November 19, 2019

Starting a Nonprofit - Avoid the Landmines

### Ronald Blue & Company Essential Church & Non Profit Update, Costa Mesa, California, June 13, 2019

Top 10 Legal and Risk Management Issues for Churches and Non Profits

### National Business Institute (NBI) Webinar, June 5, 2019

Private Foundations: The Ultimate Guide

### Fohrman & Fohrman Nonprofit Workshop Panelist, Irvine, California, January 24, 2019

Fraud Prevention for the Nonprofit Sector: Detection and Prevention

### National Business Institute (NBI) Webinar, January 16, 2019

Religious Organization Law

**Orange County Bar Association Trusts & Estates Section Meeting**, Orange, California, November 14, 2018

Charitable Planning: Private Foundations and Donor Advised Funds

**Nonprofit Collaborative of Southern California, From The Inside Out Protect & Promote Your Nonprofit in 2018**, Irvine, California, September 27, 2018

From Marijuana to #MeToo - Protecting Your Nonprofit in 2018

**Strafford Continuing Education Webinar**, September 5, 2017

Establishing Private Foundation and Reporting Requirements

**California State University, Fullerton Annual Gianneschi Summer School for Nonprofits**, Fullerton, California, August 16, 2017

Volunteers and Interns: Legal Liability and Risk Management Issues Every NPO Should Consider  
What Every NPO Should Know About Legal Liability, Risk Management

**Nonprofit Collaborative of Southern California, 2017 Nonprofit Training Series**, Santa Ana, California, May 25, 2017

Protecting Your Nonprofit's Precious Assets: Learn the Top 5 Risks!

**Long Beach Nonprofit Partnership Panelist**, Long Beach, California, May 18, 2017

What Every Nonprofit Should Know about Legal Liability, Risk Management, and Insurance

**The Nonprofit Partnership Social Enterprise Breakfast Series Panelist**, Long Beach, California, April 25, 2017

Social Enterprise: The Emergence of Hybrid Business Entities

**California State University, Fullerton 11th Annual Gianneschi Summer School for Nonprofits**, Fullerton, California, August 16, 2016

Lobbying Rules and Election Year Activities

**The Nonprofit Partnership, Volunteers, Insurance, Risk Management and the Law**, Long Beach, California, June 15, 2016

Volunteers: Six Key Legal Considerations Every NPO Should Know

**2016 Western Regional Planned Giving Conference**, Costa Mesa, California, June 3, 2016

Program Related Investments: Unlocking Private Foundation Grants that Benefit Both Your Charity and the Private Foundation

**Pepperdine University Graduate School of Education and Psychology**, October 28, 2015

Social Entrepreneurship and Social Enterprise

**California State University, Fullerton 10th Annual Gianneschi Summer School for Nonprofits**, Malibu, California, August 10, 2015

Volunteers: Six Key Legal Considerations Every NPO Should Know

**2015 Western Regional Planned Giving Conference**, Costa Mesa, California, May 28, 2015

Program Related Investments: Unlocking Private Foundation Grants that Benefit Both Your Charity and the Private Foundation

**Nonprofit Collaborative of Southern California**, Santa Ana, California, March 19, 2015

Check Your Nonprofit Pulse: People, Liability, and the Law

**AGN International North America**, National Webinar, November 6, 2014

Program Related Investments: How Private Foundations Can Make Grants Do Double Duty

**Planned Giving Round Table of Orange County**, Santa Ana, California, November 6, 2014

Program Related Investments: How Private Foundations Can Make Grants Do Double Duty

**Keeping Your Organization Healthy, Wealthy, and Wise**, Irvine, California, October 14, 2014  
Keys to Protecting the Legal Health of Your Organization

**OneOC**, Santa Ana, California, July 15, 2014  
Legal Considerations for Nonprofits Exploring Social Enterprise

**OneOC**, Santa Ana, California, July 15, 2014  
Program Related Investments: Making Grants Do Double Duty

**Christian Leadership Alliance 2014 National Conference**, Dallas, Texas, April 15, 2014  
Ministries and Earned-Income Activities

**OneOC**, Santa Ana, California, December 3, 2013  
Program Related Investments: Making Grants Do Double Duty

**Orange County Nonprofit Management Forum**, Irvine, California, September 20, 2013  
Legal Considerations for Nonprofits Exploring Social Enterprise

**Unlocking the Doors Nonprofit Seminar**, San Diego, California, July 17, 2013  
Hot Topics for Nonprofits

**Orange County Nonprofit Management Forum**, Irvine, California, May 17, 2013  
Program Related Investments: How Private Foundations Can Make Grants Do Double Duty

**Unlocking the Doors Nonprofit Seminar**, Newport Beach, California, February 20, 2013  
Program Related Investments: How Private Foundations Can Make Grants Do Double Duty

**Orange County Nonprofit Management Forum**, Irvine, California, April 27, 2012  
Annual Nonprofit Legal Update

**Partnership for Philanthropic Planning of Orange County**, Costa Mesa, California, January 5, 2012  
Legal Considerations for Nonprofits Exploring Social Enterprise

**2011 Financial Forum for Ministries**, San Diego, California, November 9, 2011  
Tax and Legislative Developments Affecting Exempt Organizations

**2011 Financial Forum for Ministries**, Brea, California, November 8, 2011  
Tax and Legislative Developments Affecting Exempt Organizations

**Nonprofit Roundtable**, Tustin, California, October 26, 2011  
Legal and Tax Aspects of Fundraising

**Orange County Nonprofit Management Forum**, Irvine, California, October 21, 2011  
Legal and Tax Aspects of Fundraising

**ProVisors Joint Meeting of the Orange County Lawyer and Legal Professionals and Orange County Nonprofit Affinity Groups**, Irvine, California, August 4, 2011  
Recent Legal Developments: Nonprofits and Franchise Law, Nonprofit Governance

**Orange County Nonprofit Management Forum**, Irvine, California, March 18, 2011  
Legal Issues Update – Avoiding Hazards and New Developments

**Orange County Nonprofit Management Forum**, Irvine, California, July 23, 2010  
Anatomy of the California AG’s Case Against the Monterey County AIDS Project

**Orange County Nonprofit Management Forum**, Irvine, California, March 18, 2010  
Legal Considerations for Nonprofits Exploring Social Enterprise

**The East Los Angeles Community Union (TELACU) and Urban Strategies FuturoNow Organizational Capacity Building Conference**, Costa Mesa, California, June 9, 2009

Legal Considerations for Nonprofits Exploring Social Enterprise

**California State University, Fullerton** – Continuing Education Instructor, Fullerton, California, April 2009  
Legal Aspects of Fundraising

**Inland Empire Planned Giving Round Table**, Palm Springs, California, January 25, 2008  
Family Foundations and the Pension Protection Act of 2006

**Orange County Paralegal Association**, Orange County, California, October 25, 2005 & August 23, 2007  
Family Foundations, A Look at the Alternatives

## **COMMUNITY INVOLVEMENT**

**Nonprofit Collaborative of Southern California:** Co-Founder

**Orange County Nonprofit Management Forum:** Co-Founder

**Enlace USA:** Board Member

**The State Bar of California:** Member

**Saddleback Valley YMCA:** Previously served on Board of Managers

**Saddleback Valley Pop Warner Football:** Head Coach and Assistant Coach, 2011, 2008 – 2009

**Mission Viejo Youth Football:** Head Coach (10 and 11-year old boys), 2010