

BROWN & STREZA

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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

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