BROWN STREZA



CASEY S. HALE

PARTNER

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PRACTICE AREAS

Philanthropist Representation
Religious Institutions
Nonprofit Organizations
Educational Organizations
Higher Education

ABOUT

Casey Hale is a partner with Brown & Streza, LLP, a law firm based in Orange County, California. Since 2002, he has exclusively represented nonprofit organizations, advising clients on the complex legal, corporate, and tax matters unique to the nonprofit sector.

Casey's practice encompasses formation of new entities, organizational governance, international grantmaking and operations, intellectual property, executive compensation and intermediate sanctions (including minister compensation), unrelated business taxable income, structuring and operating subsidiaries and joint ventures, property tax exemption matters, mergers, and dissolutions.

Over his two and a half decades of the practice of law, Casey has formed and obtained tax-exempt status for hundreds of nonprofit organizations (including organizations exempt under IRC §§ 501(c)(3), 501(c)(4), and 501(c)(6)), while also providing sophisticated ongoing counsel to mature organizations on complex governance, compliance, and operational matters.

Casey's clients include private foundations with assets ranging from emerging to over $50 million (including company-sponsored foundations), public charities, supporting organizations, and hybrid entities. His representation of religious organizations includes church denominations, churches ranging from small congregations to megachurches, integrated auxiliaries of churches, international missions organizations, and ministry organizations.

Casey established the first L3C (low-profit limited liability company) under Wyoming law in 2009 and has experience advising clients on hybrid legal structures. He was recognized as a "Southern California SuperLawyers-Rising Star" by Los Angeles Magazine from 2009 through 2012, a distinction awarded to just 2.5% of attorneys under age 40 for excellence in legal practice.

PROFESSIONAL BACKGROUND

Casey earned his Juris Doctor from Whittier Law School, where he attended on a merit scholarship. Prior to law school, he served in the United States Army as a Russian linguist.

Casey holds a Bachelor of Arts in Cultural Anthropology with a concentration in Archaeology from Vanguard University of Southern California. His archaeological fieldwork includes excavations at Tel Dor in Israel; Koloko-Honok□hau National Historic Park and the John Young Homestead at Pu'ukohol□ Heiau in Hawai'i; and Gabrieliño and Juaneño sites in Orange County, California, including Crystal Cove, Newport Coast, and Huntington Beach.

Casey served as an adjunct professor at Concordia University Irvine, where he developed and taught Legal Aspects of Managing a Nonprofit Organization as part of the university's undergraduate Nonprofit Leadership degree program.

PROFESSIONAL RECOGNITION

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

PUBLICATIONS

White Paper – January 2008

- New Regulations Will Govern Type III Supporting Organizations in 2008

SPEAKING ENGAGEMENTS & TEACHING

Fieldstone Leadership Network OC, Live Interactive Webinar, August 6, 2026

- Co-Presenter, Nonprofit Legal Issues That May Not Keep You Up At Night, But Should . . .

Napa Institute, Napa, California, July 25, 2026

- Co-Presenter, The Federal Scholarship Tax Credit: A Historic Opportunity for Catholic Education

Napa Legal Nonprofit Summit, Napa, California, July 22, 2026

- Co-Presenter, Exempt or Registered? A Practical Guide for Religious Nonprofits

Fieldstone Leadership Network OC, Irvine, California, April 8, 2026

- Presenter, Comparing PFs, DAFs, & SOs

Napa Legal Nonprofit Summit, Napa, California, July 23, 2025

- Co-Presenter, Nonprofit Legal Issues that May Not Keep You Up at Night, But Should

Good Counselor Project National Lawyers Conference , Washington, DC, March 27, 2025

- Co-Presenter, Models of Church Growth: Mergers & Acquisitions

Napa Legal Institute Nonprofit Summit, Napa, California, July 24, 2024

- Co-Presenter, Nonprofit Excellence: Governance and Fiduciary Duties

Family Enterprise USA, Live Interactive Webinar, September 13, 2023

- Co-Presenter, Philanthropic Strategies for Successful Families

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 & Nonprofit Update, Costa Mesa, California, June 13, 2019

- Top 10 Legal and Risk Management Issues for Churches and Nonprofits

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

TEGE Exempt Organizations Council – Member

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