

Illinois Attorney General's Charitable Advisory Council

Meeting Minutes

November 3, 2025

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Meeting Minutes

A meeting of the Charitable Advisory Council was held on Monday, November 3, 2025, at 10:00 a.m. via Zoom. In total, 12 individuals attended the meeting.

PRESENT:

Byram Fager, Southern Illinois Community Foundation
Donna Davis, University of Illinois Foundation
Dr Euan Hague, DePaul University
Erica Spangler Raz, Spangler Raz Law & Consulting, Global Philanthropy Partnerships
Graham Grady, Lloyd A. Fry Foundation / Taft
Julianne Buck, Community Foundation of Grundy County
Maria Pesqueira, Healthy Communities Foundation
Patricia H. Lee, Loyola Law School Business Law Clinic
Whitney Wade, Chicago Foundation for Women

In addition, the following staff members from the Illinois Attorney General's Office were present:

Kristin Louis, Theresa Geary

Others in attendance include:

Seyon Park, Law Student

Members not in attendance:

Dr Jennifer Mosley, UChicago Obama Foundation Scholars Program

Emily Friedman, John D. & Catherine T. MacArthur Foundation

Jodi Patt, C3 Legal

I. Welcoming and Introductions

Theresa Geary, Illinois Attorney General's Office, opened the meeting at 10:03 a.m. thanking individuals for joining and conducting a roll call.

II. Approval of Minutes of Previous Meeting Minutes (December 12, 2016; December 9, 2021; June 25, 2025)

Theresa Geary explained that there are past meeting minutes needing to be reviewed and asked members to review the minutes from the December 12, 2016 Annual Meeting. Maria Pesqueira motioned to approve the minutes, and Kristin Louis seconded the motion. A voice vote occurred with all members voting in favor of approving the minutes except for Dr. Euan Hague who abstained. There were no objections.

Theresa Geary asked members to review the minutes from the December 9, 2021 Executive Committee. Graham Grady motioned to approve the minutes, and Kristin Louis seconded. A voice vote occurred with all members voting in favor of approving the minutes except for Dr. Euan Hague who abstained. There were no objections.

Theresa Geary asked members to review the minutes from the meeting on June 25, 2025. Julie Buck motioned to approve the minutes, and Kristin Louis seconded. A voice vote occurred with all members voting in favor of approving the minutes except for Dr. Euan Hague who abstained. There were no objections.

All approved meeting minutes will be posted to the Attorney General's Office's website.

Theresa also indicated that as mentioned at the last meeting, a link to the online Open Meetings Act (OMA) Training will be shared with members.

III. Updates from the OAG Charitable Trust Bureau

Kristin Louis, Bureau Chief, Charitable Trust provided an update on the launch of the online filing system and portal that was demoed at the last meeting. She explained there was a brief delay in launching the online portal as the developer recommended a phased a slightly delayed roll out (changed from July 31, 2025, to August 2025).

On August 11, 2025, the AGIL-990, online extension process and public searchable database went live. On August 18, 2025, the religious exemption form, CO-3 and annual community benefit forms went live. On August 25, 2025, the registration package went live. As of August 25th, fully live. Still addressing issues identified by the public and staff as testing continues.

Phase II has begun, which is the online paid professional fundraiser and solicitor registration and report forms. Anticipated to go live January 2026.

As of October 31st, there are over 1600 users, and the highest day of usage was 10/29/2025. People filing over the weekends, which is a positive of the new system as the goal is to make it more convenient for volunteers to interact with OAG.

Kristin shared the rejection rates between online filings as of this past Friday (1,979 total filings, 87% accepted and 13% rejected) versus paper filings (9,412 total filings, 71% accepted and 29% rejected). Every week the acceptance rate increases for online filings. Approval of online filings is almost same day by staff. This may change as the volume of online filings increases. The common mistakes for online filings are inputting incorrect dates which results in a miscalculation of filings and fees as well as bad uploads of required documents (unreadable, missing pages).

Kristin shared that the bureau has received primarily positive feedback and shared tips for acceptance of online filings. Please only file the required documents. If individuals share documents that are not required such as other state filings, internal documents, schedule Bs, etc. that delays the approval process as staff needs to redact these documents. In addition, some users are checking the wrong pre-screening questions (i.e. bank trusts), and the OAG is working to clarify instructions to help users understand the selection options. Finally, some users are trying to avoid signature requirements.

Kristin shared a reminder that there is online extension process which helps with paper delays and that staff are better able to track progress with the new system. In addition, organizations can receive Letters of Good Standing online which will be an asset as grant season begins in early 2026.

Kristin transitioned into the outreach efforts that have been conducted. There was a postcard sent to November filers regarding the online portal, a press release (September 2025), updated website with demo videos, and staff are conducting presentations.

Members asked questions regarding account creation, payment options and paper filings. Currently organizations can continue to file either online or via paper filings.

IV. Discussion on Outreach and Rollout of the Charitable Trust Online Filing and Public Access System

Members were asked for suggestions and feedback to help ensure as many different outreach opportunities are pursued. Are there communities that should be contacted?

Theresa Geary shared there will be a webinar demo on November 21st at 10:00 a.m. The invitation will be released shortly, and CAC members are welcome to attend and encouraged to share the invitation with organizations, funders, etc.

The OAG met with the with the Alliance of Community Foundations, East Central Illinois Community Foundation and others to share this announcement and see if they have the ability to attend our webinar or are interested in hosting a webinar or in-person presentation for their members/funded organizations.

Theresa Geary highlighted the new demo videos - filing 990s, how to make an extension request. Additional videos to come including how to file initial registration and how to create an online account.

Members discussed ideas and asked questions.

Euan Hauge shared a recommendation that a one-page PDF of step-by-step instructions be created to complement the videos; QR Code for sharing on social media/LinkedIn.

Graham Grady suggested including this with late notice letters and any notices sent prior to cancellation and that Forefront be contacted regarding the new portal.

Theresa will share the links to the videos, website/portal, and the webinar and any other resources that members can share with their networks.

V. Discussion on Additional Education Initiatives for Charities

Theresa Geary shared the ideas that were received at the last meeting regarding additional education initiatives while continuing to share updates from OAG and work on the portal rollout.

Federal legislation (next meeting), modernizing gift restrictions, how to prepare for your first audit, donor advised funds versus creating your own nonprofit, revamping the start up checklist. Julei Buck shared great resources

Plan for education at next meetings.

Other topics happy to add in or existing presentations that they can share

Revising the OAG website to share resources – recommendations/resources from the CAC page (Hasn't been updated in several years), a project to look at in the future

Patirica Lee recommended SALT (Society of American Law Teachers) as a presentation venue and Artificial Intelligence as a future topic.

Shared where we ended up from the last meeting – future topics or next webinars

VI. Schedule of Meetings and Member Comment

After a discussion, quarterly meetings were recommended and the next meeting will be Monday, February 23, 2026, at 10:00 a.m. – 11:30 a.m.

Theresa will share a calendar alert to hold the time on members' calendars as well as the resources mentioned and the OMA training link.

Donna Davis asked about gofundme updates. Kristin Louis shared she is aware of the situation and the office is reviewing. Julie Buck shared a donor-initiated fundraiser policy sample.

Julie Buck recommended covering Raffles, Silent Auctions, etc. Kristin Louis shared that those activities are regulated by the Department of Revenue and perhaps they could join us for a presentation.

VII. **Public Comment**

Theresa Geary asked for public comment.

There was no public comment.

VIII. **Adjournment**

Julie Buck mentioned to adjourn the meeting and Euan Hague seconded the motion. All members voted to adjourn the meeting. Meeting adjourned at 11:24 a.m.