



Rocky Mountain Tax Seminar for Private Foundations

Presented by El Pomar Foundation

DAY 1: WEDNESDAY, SEPTEMBER 13, 2023

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| 8:00 AM-8:45 AM | Shuttle to Penrose House, Garden Pavilion
Departs from Broadmoor West |
| 8:15 AM-9:00 AM | Attendee Check-in and Breakfast
Garden Pavilion |
| 9:00 AM-9:05 AM | Welcome
Kyle H. Hybl, President and CEO, El Pomar Foundation |
| 9:05 AM-9:10 AM | Announcements and Introductions
Eleanor Martinez and Jim Hasson |
| 9:10 AM-9:35 AM | Harvard and UNC: The Decisions
Jim Hasson |
| 9:35 AM-10:00 AM | Harvard and UNC: The Implications for Private Foundations
Celia Roady |
| 10:00 AM-10:15 AM | Break |
| 10:15 AM-11:15 AM | Tax, Legal, and Governance Issues on Our Desks: A Panel Discussion
Among Foundation In-House Counsel
Moderator:
Josh Mintz, John D. and Catherine T. MacArthur Foundation
Panelists:
Elizabeth Peters, Hewlett Foundation
Nishka Chandrasoma, Ford Foundation
Sasha Abrams, Gordon and Betty Moore Foundation
John Tyler, Ewing Marion Kauffman Foundation |
| 11:15 AM-11:30 AM | Break |
| 11:30 AM-12:00 PM | How Can Founders Be Assured of Adherence to Mission
Ofer Lion |
| 12:00 PM-1:00 PM | Lunch
Garden Pavilion |

- 1:00 PM-2:00 PM Practical Issues Confronting Private Foundations
Faculty
- 2:00 PM-2:05 PM Closing Remarks
Maureen Lawrence, Sr. Vice President, General Counsel and Director of
Community Programs, El Pomar Foundation
- 2:05 PM-2:30 PM Shuttle to Broadmoor West
Departs from Garden Pavilion, upper parking lot
- 4:30 PM-5:00 PM Shuttle to Penrose House
Departs from Broadmoor West
- 4:30 PM-6:30 PM Welcome Reception, Penrose House – Fountain Courtyard
Cocktails and hors d'oeuvres
**Dinner is at your leisure*
- 6:15 PM-6:45 PM Shuttle to Broadmoor West
Departs from Penrose House
- DAY 2: THURSDAY, SEPTEMBER 14, 2023**
- 8:00 AM-8:45 AM Shuttle to Penrose House, Garden Pavilion
Departs from Broadmoor West
- 8:15 AM-9:00 AM Breakfast
Garden Pavilion
- 9:00 AM-9:05 AM Announcements
- 9:05AM-9:30 AM What Foundations Should Know About the New Clean Energy Tax
Incentives
Ruth Madrigal
- 9:30 AM-10:20 AM What Legal Issues Are Involved in Foundation Governance Decisions?
Maureen Lawrence and Ann Batlle
- 10:20 AM-11:10 AM Preparing Foundations for IRS and AG Investigations
Ofer Lion and Ruth Madrigal
- 11:10 AM-11:25 AM Break
- 11:25 AM-11:50 AM Designing and Structuring Joint PRI's
Krysta Copeland

11:50 AM-12:15 PM Practical Ways to Deal With a Breach of Grant or PRI Agreement
Celia Roady

12:15 PM-1:15 PM Lunch
Garden Pavilion

1:15 PM-2:05 PM Practical Issues Confronting Private Foundations
Faculty

2:00 PM-2:30 PM Shuttle to Broadmoor West
Departs from Garden Pavilion, upper parking lot

DAY 3: FRIDAY, SEPTEMBER 15, 2023

8:00 AM-8:45 AM Shuttle to Penrose House, Garden Pavilion
Departs from Broadmoor West

8:15 AM-9:00 AM Breakfast
Garden Pavilion

9:00 AM-9:10 AM Announcements and Survey Evaluations

9:10 AM-10:00 AM Foundation Use of Contracts Vs. Grants: Special Considerations For
Research Efforts
Ann Batlle

10:00 AM-10:30 AM Grants and Transfers to Other Foundations
Jim Hasson

10:30 AM-10:45 am Break

10:45 AM-11:10 AM What the Heck Are GLAM, TEOS and EO BMF Extract? How the Treasury
and IRS Now Interpret and Communicate EO Laws
Ruth Madrigal

11:10 AM-12:00 PM Practical Issues Confronting Private Foundations
Faculty

12:00 PM-12:30 PM Shuttle to Broadmoor West
Departs from Garden Pavilion, upper parking lot.

Save the Date: September 11-13, 2024.
rmtaxseminar.org