



## Rocky Mountain Tax Seminar for Private Foundations

*Presented by El Pomar Foundation*

### **DAY 1: WEDNESDAY, SEPTEMBER 10, 2025**

8:00 AM-8:45 AM	Shuttle to Penrose House Departs from Broadmoor West
8:15 AM-9:00 AM	Attendee Check-in and Breakfast Penrose House
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 Jim Hasson, Ruth Madrigal, and Eleanor Martinez
9:10 AM-10:25 AM	Current Developments Relevant for Private Foundations Ruth Madrigal and Celia Roady
10:25 AM-10:40 AM	Break
10:40 AM-11:15 AM	Demystifying Tax Law, Guidance, and Enforcement Sasha Abrams and Ruth Madrigal
11:15 AM-11:55 AM	How Can Foundations Legally Influence Potential Legislative and Administrative Changes? Celia Roady
11:55 AM-1:00 PM	Lunch
1:00 PM-1:50 PM	Investment Strategies During A Period of Turmoil David Shevlin
1:50 PM-2:40 PM	Practical Issues Confronting Private Foundations Faculty
2:40 PM-3:00 PM	Shuttle to Broadmoor West Departs Garden Pavilion - Upper Lot

3:00 PM-4:30 PM	Peer-to-Peer Networking Sessions <i>Private Foundation President/CEOs, Carriage House Private Foundation Finance Professionals, Proby Room</i>
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 <i>*Dinner is at your leisure</i>
6:15 PM-6:45 PM	Shuttle to Broadmoor West Departs from Penrose House

## **DAY 2: THURSDAY, SEPTEMBER 11, 2025**

8:00 AM-8:45 AM	Shuttle to Penrose House Departs from Broadmoor West
8:15 AM-9:00 AM	Breakfast Penrose House
9:00 AM-9:05 AM	Announcements
9:05 AM-9:55 AM	Combinations and Other Reorganizations of Private Foundations: Current Motivations and Responses Ann Batlle and David Shevlin
9:55 AM-10:45 AM	Key Mistakes Made by Private Foundations and Prevention Planning Moderator – Ruth Madrigal
10:45 AM-11:00 AM	Break
11:00 AM-12:00 PM	General Counsel Roundtable Sasha Abrams, Nishka Chandrasoma, and Maureen Lawrence
12:00 PM-1:00 PM	Lunch
1:00 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 Lot

**DAY 3: FRIDAY, SEPTEMBER 12, 2025**

8:00 AM-8:45 AM	Shuttle to Penrose House Departs from Broadmoor West
8:15 AM-9:00 AM	Breakfast Penrose House
9:00 AM-9:10 AM	Announcements and Survey Evaluations
9:10 AM-10:00 AM	Salary, Bonus, and Deferred Compensation Plans for Officers and Board Members: What is Acceptable, Both Legally and Reputationally? Jim Hasson and James Wynn
10:00 AM-10:50 AM	Qualifying and Non-Qualifying Distributions, Including Impact Investing Ann Battle and Celia Roady
10:50 AM-11:15 AM	The Value and Cost of Indemnification and Insurance Arrangements Ann Battle and Maureen Lawrence
11:15AM-11:30 AM	Break
11:30 AM- 12:30 PM	Practical Issues Confronting Private Foundations Faculty
12:30 PM-12:45PM	Shuttle to Broadmoor West Departs from Garden Pavilion - Upper Lot

**Save the Date: September 23-25, 2026**

<https://www.elpomar.org/rmts/>