



Rocky Mountain Tax Seminar for Private Foundations

Presented by El Pomar Foundation

DAY 1: WEDNESDAY, SEPTEMBER 23, 2026

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, Main Dining Room
9:00 AM	Start of Seminar Penrose House, Garden Pavilion
9:00 AM-9:05 AM	Welcome Kyle H. Hybl, El Pomar President and CEO
9:05 AM-9:15 AM	Announcements and Introductions Jim Hasson and Ruth Madrigal, Co-Chairs Eleanor Martinez, Seminar Director
9:15 AM-10:15 AM	Current Developments Relevant for Private Foundations Ann Batlle and Ruth Madrigal
10:15 AM-10:30 AM	Break
10:30 AM-11:15 AM	What do Foundations need to know about Anti-Discrimination Laws and DEI? Ann Batlle
11:15 AM-12:00 PM	What do Foundations Need to Know about DAFs and Fiscal Sponsors? David Shevlin
12:00 PM-1:00 PM	Lunch
1:00 PM-1:35 PM	Faculty Favorites: Self-dealing Situations Faculty
1:35 PM-2:35 PM	Practical Issues Confronting Private Foundations Faculty
2:30 PM-3:00 PM	Shuttle to Broadmoor West Departs Garden Pavilion - Upper 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 Heavy 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 24, 2026

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

8:15 AM-9:00 AM Breakfast
Penrose House, Main Dining Room

9:00 AM Start of Seminar
Penrose House, Garden Pavilion

9:00 AM-9:05 AM Announcements

9:05 AM-9:35 AM Employment Issues for Foundations
Jim Hasson

9:35 AM-10:45 AM Getting started with PRIs
Celia Roady and David Shevlin

10:45 AM-11:00 AM Break

11:00 AM-12:00 PM CEO Roundtable
Moderated by Celia Roady
Amy Goldman, GHR Foundation CEO and Chair
Kyle Hybl, El Pomar President and CEO
Katie Kramer, Boettcher Foundation President and CEO

12:00 PM-1:00 PM Lunch

1:00 PM-2:00 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 25, 2026

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

8:15 AM-9:00 AM Breakfast
Penrose House, Main Dining Room

9:00 AM Start of Seminar
Penrose House, Garden Pavilion

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

9:10 AM-10:00 AM Exams, Investigations, and other Oversight Mechanisms
Ruth Madrigal and David Shevlin

10:00 AM-10:50 AM Crisis Communications Topic: What Do You Say When Things Go Wrong?
Andy Mountain, President and CEO, GBSM
Moderated by Ann Batlle

10:50 AM-11:15 AM Lawyer-Client Privilege in the Age of AI
Jim Hasson

11:15 AM-11:30 AM Break

11:30 AM-12:30 PM Practical Issues Confronting Private Foundations
Faculty

12:30 PM-12:45 PM Shuttle to Broadmoor West
Departs from Garden Pavilion – Upper Lot

Save the Date: September 15-17, 2027

www.elpomar.org/rmts/