



## Rocky Mountain Tax Seminar for Private Foundations

*Presented by El Pomar Foundation*

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**DAY 1: WEDNESDAY, SEPTEMBER 13, 2023**

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



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- 2:00 PM    Closing Remarks  
Maureen Lawrence, Sr. Vice President, General Counselor and Director of  
Community Programs, El Pomar Foundation
- 2:05 PM    Shuttle to Broadmoor West  
Departs from Garden Pavilion, Upper Lot
- 4:30 PM    Shuttle to Penrose House  
Departs from Broadmoor West
- 4:30 PM    Welcome Reception, Penrose House – Fountain Courtyard  
Cocktails and Hors d'oeuvres  
*\*Dinner at your leisure*
- 6:15 PM    Shuttle to Broadmoor West, Departs from Penrose House



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**DAY 2: THURSDAY, SEPTEMBER 14, 2023**

8:00 AM	Shuttle to Garden Pavilion, Upper Lot Departs from Broadmoor West
8:15 AM	Breakfast Garden Pavilion
9:00 AM	Announcements
9:05 AM	What Foundations Should Know About the New Clean Energy Tax Incentives Ruth Madrigal
9:30 AM	Governance Principles and Practices for Private Foundations Maureen Lawrence and Ann Batlle
10:05 AM	Preparing Foundations for IRS and AG Investigations Ofer Lion and Ruth Madrigal
10:55 AM	Break
11:10 AM	Designing and Structuring Joint PRI's Krysta Copeland
11:35 AM	Practical Ways to Deal With a Breach of Grant or PRI Agreement Celia Roady
12:00 PM	Lunch Garden Pavilion
1:00 PM	Practical Issues Confronting Private Foundations Faculty
2:00 PM	Shuttle to Broadmoor West Departs from Garden Pavilion, Upper Lot



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