



Rocky Mountain Tax Seminar for Private Foundations

Presented by El Pomar Foundation

DAY 1: WEDNESDAY, SEPTEMBER 11, 2024

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| 8:00 AM-8:45 AM | Shuttle to Garden Pavilion, Upper Lot
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-9:15 AM | Announcements and Introductions
Eleanor Martinez, Jim Hasson, and Ruth Madrigal |
| 9:15 AM-10:15 AM | Current Developments
Ruth Madrigal and Rosemary Fei |
| 10:15 AM-10:30 AM | Break |
| 10:30 AM-11:00 AM | Key Issues in Grantmaking
Ann Batlle |
| 11:00 AM-11:30 AM | Key Issues with Self-Dealing
Celia Rody |
| 11:30 AM-12:00 PM | Key Issues with Excess Business Holdings
Jim Hasson |
| 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 Regional Partnerships Program Officer, El Pomar Foundation |
| 2:05 PM-2:30 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 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 12, 2024**
- 8:00 AM-8:45 AM Shuttle to Garden Pavilion, Upper Lot
Departs from Broadmoor West
- 8:15 AM-9:00 AM Breakfast
Penrose House
- 9:00 AM-9:05 AM Announcements
- 9:05 AM-9:30 AM What Private Foundations Need to Know About DAFs
Jim Hasson
- 9:30 AM-10:00 AM What Private Foundations Need to Know About Fiscally-Sponsored
Projects
Rosemary Fei
- 10:00 AM-10:50 AM PRI and MRI Case Studies
Ruth Madrigal and Celia Rody
- 10:50 AM-11:05 AM Break
- 11:05 AM-12:05 PM General Counsel Roundtable
Josh Mintz, Ricardo Castro, and Maureen Lawrence
- 12:05 PM-1:00 PM Lunch
Garden Pavilion
- 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 13, 2024

8:00 AM-8:45 AM	Shuttle to Garden Pavilion, Upper Lot 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-10:25 AM	What Private Foundations Need to Know About Compensation and Employment Taxes Jim Hasson and James Wynn
10:25 AM-10:40 am	Break
10:40 AM-11:30 AM	Key Issues in Charitability Ann Batlle
11:30- 12:30 PM	Practical Issues Confronting Private Foundations Faculty
12:30 PM-1:00 PM	Shuttle to Broadmoor West Departs from Garden Pavilion, Upper Lot

Save the Date: September 10-12, 2025
Elpomar.org/rmts