



Rocky Mountain Tax Seminar for Private Foundations

Presented by El Pomar Foundation

DAY 1: WEDNESDAY, SEPTEMBER 11, 2024

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-9:15 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 Roady
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 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-9:30 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 Roady

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 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-10:25 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

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