

PRELIMINARY AGENDA—ROCKY MOUNTAIN TAX SEMINAR FOR PRIVATE FOUNDATIONS

The Preliminary Agenda of Topics for the 2025 Seminar is given below. Because of the extraordinary uncertainty regarding the pace and extent of legislative, regulatory, administrative and judicial developments which may occur after the time of this publication, the exact content of the topics for discussion in September may be changed to reflect more clearly the events that occur in coming months.

What Current Developments Are Relevant for Private Foundations?

Demystifying the Process for the Creation of Tax Law and Administrative Restrictions and Enforcement.

How Can Foundations Legally Influence Potential Legislative and Administrative Changes?

What Alternatives Do Foundations Have In Managing Investment Assets?

Combinations, Divisions and Other Reorganizations of Private Foundations: Why and How?

What Are the Appropriate Building Blocks for Proper Management of Private Foundations?

General Counsels' Perspectives on Contemporary Troublesome Issues

Qualifying and Non-Qualifying Distributions and Investments by Foundations

What Salary, Bonus and Deferred Compensation Plans for Officers and Board Members Are Acceptable, Both Legally and Reputationally?

The Value and Cost of Indemnification and Insurance Arrangements