

# Agenda

## 2023 Private Foundation Conference

Tuesday, September 19, 2023	
9:00 a.m.–9:05 a.m.	Welcome message
9:05 a.m.–10:05 a.m.	<p><b>Private Foundation Taxable Expenditures and Internal Controls</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Pamela Alexanderson</a>, <i>Moss Adams</i></li> <li>• <a href="#">Michael Fine</a>, <i>Wyatt, Tarrant &amp; Combs, LLP</i></li> <li>• <a href="#">Claire Hilleary</a>, <i>Moss Adams</i></li> <li>• Chelsea Ritchie, <i>Moss Adams</i></li> <li>• <a href="#">Carla Romero</a>, <i>McCune Foundation</i></li> <li>• <a href="#">Mark Scheffler</a>, <i>Timken Foundation of Canton</i></li> </ul>
10:05 a.m.–10:10 a.m.	Break
10:10 a.m.–11:40 a.m.	<p><b>How and When to Outsource: Grant Compliance, Accounting, and Human Capital</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Brett Addis</a>, <i>Moss Adams</i></li> <li>• Amy Ahyo, <i>Moss Adams</i></li> <li>• Ariel Lybarger, <i>Moss Adams</i></li> <li>• Jennifer Teicheira, <i>Moss Adams</i></li> </ul>
11:40 a.m.–12:20 p.m.	Break
12:20 p.m.–1:20 p.m.	<p><b>Current Legislative and Guidance Updates in the World of Philanthropy</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Meghan Biss</a>, <i>Caplin &amp; Drysdale</i></li> <li>• <a href="#">Lauren Haverlock</a>, <i>Moss Adams</i></li> <li>• <a href="#">Alexander Reid</a>, <i>BakerHostetler</i></li> </ul>
1:20 p.m.–1:25 p.m.	Break
1:25 p.m.–2:25 p.m.	<p><b>Ask the Experts Panel</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Brett Addis</a>, <i>Moss Adams</i></li> <li>• <a href="#">Wendy Campos</a>, <i>Foundations National Practice Leader, Moss Adams</i></li> <li>• <a href="#">Elizabeth Dollar</a>, <i>Not-for-Profit National Practice Leader, Moss Adams</i></li> <li>• <a href="#">Lauren Haverlock</a>, <i>Moss Adams</i></li> <li>• Ariel Lybarger, <i>Moss Adams</i></li> <li>• <a href="#">Alexander Reid</a>, <i>BakerHostetler</i></li> </ul>



Wednesday, September 20, 2023	
9:00 a.m.–9:05 a.m.	Welcome message
9:05 a.m.–10:05 a.m.	<b>Accountant versus Attorney: 990-PF Through a Different Lens</b> <ul style="list-style-type: none"><li>• <a href="#">Wendy Campos</a>, <i>Foundations National Practice Leader, Moss Adams</i></li><li>• <a href="#">Maggie Elliott</a>, <i>Moss Adams</i></li><li>• <a href="#">Marisa Meltebeke</a>, <i>Davis Wright Tremaine</i></li></ul>
10:05 a.m.–10:10 a.m.	Break
10:10 a.m.–11:10 a.m.	<b>501(c)(4): Rules, Guidance, and Opportunities</b> <ul style="list-style-type: none"><li>• <a href="#">Kimberly Eney</a>, <i>Loeb &amp; Loeb</i></li><li>• <a href="#">Lauren Haverlock</a>, <i>Moss Adams</i></li><li>• <a href="#">Diara Holmes</a>, <i>Loeb &amp; Loeb</i></li></ul>
11:10 a.m.–11:50 a.m.	Break
11:50 a.m.–12:50 p.m.	<b>Embedding and Operationalizing DEIBJ in Our Missions and Programs</b> <ul style="list-style-type: none"><li>• <a href="#">Tanir Amj</a>, <i>CARESTAR Foundation</i></li><li>• <a href="#">Ken Oliver</a>, <i>Checkr Foundation</i></li><li>• <a href="#">Illyasha Peete</a>, <i>ClimateWorks Foundation</i></li><li>• <a href="#">Kinman Tong</a>, <i>Moss Adams</i></li></ul>
12:50 p.m.–12:55 p.m.	Break
12:55 p.m.–1:55 p.m.	<b>Leading with Purpose: Essential Traits of Highly Effective Foundation Boards</b> <ul style="list-style-type: none"><li>• <a href="#">Annie Rose Favreau</a>, <i>Moss Adams</i></li><li>• <a href="#">LeeAnne Stivers</a>, <i>Moss Adams</i></li></ul>
1:55 p.m.–2:00 p.m.	Break
2:00 p.m.–3:00 p.m.	<b>Ask the Experts Panel</b> <ul style="list-style-type: none"><li>• <a href="#">Wendy Campos</a>, <i>Foundations National Practice Leader, Moss Adams</i></li><li>• <a href="#">Maggie Elliott</a>, <i>Moss Adams</i></li><li>• <a href="#">Marisa Meltebeke</a>, <i>Davis Wright Tremaine</i></li><li>• <a href="#">Jennifer Price</a>, <i>Moss Adams</i></li><li>• <a href="#">Colleen Rozillis</a>, <i>Moss Adams</i></li><li>• <a href="#">Kinman Tong</a>, <i>Moss Adams</i></li></ul>