

Agenda

2022 Private Foundation Conference

Tuesday, August 16, 2022	
9:00 a.m.–9:05 a.m.	Welcome message
9:05 a.m.–10:20 a.m.	Economic Update and Managing Your Minimum Distribution Requirement <ul style="list-style-type: none"> • Pam Alexanderson, Moss Adams • Nancy McGlamery, Adler Colvin • Michelle Walker, Moss Adams Wealth Advisors
10:20 a.m.–10:25 a.m.	Break
10:25 a.m.–11:40 a.m.	Investment Update: Part One <ul style="list-style-type: none"> • Travis Allen, Bernstein • Wendy Campos, Moss Adams • Elizabeth Dollar, Moss Adams • Tracy Paglia, Moss Adams • Colleen Rozillis, Moss Adams
11:40 a.m.–12:15 p.m.	Break
12:15 p.m.–1:30 p.m.	Investment Update: Part Two <ul style="list-style-type: none"> • Wendy Campos, Moss Adams • Shelley Davis, Coleman Foundation • Elizabeth Dollar, Moss Adams • Clare Golla, Bernstein • Tracy Paglia, Moss Adams • Colleen Rozillis, Moss Adams

Wednesday, August 17, 2022	
9:00 a.m.–9:05 a.m.	Welcome message



9:05 a.m.–10:35 a.m.	Foundations in the Headlines and What Can Get Your Private Foundation in Trouble <ul style="list-style-type: none">• Jonathan Blum, <i>Polsinelli</i>• Patty Mayer, <i>Moss Adams</i>• Jennifer Price, <i>Moss Adams</i>• Chelsea Ritchie, <i>Moss Adams</i>
10:35 a.m.–10:40 a.m.	Break
10:40 a.m.–11:55 a.m.	Cybersecurity <ul style="list-style-type: none">• Richard McConnell, <i>Kenneth Rainin Foundation</i>• Mark Steranka, <i>Moss Adams</i>• Kevin Villanueva, <i>Moss Adam</i>• Lauren Webster, <i>Kenneth Rainin Foundation</i>
11:55 a.m.–12:15 p.m.	Break
12:15 p.m.–1:45 p.m.	Current Updates and Use of Donor-Advised Funds <ul style="list-style-type: none">• Lauren Haverlock, <i>Moss Adams</i>• Elinor Ramey, <i>Steptoe & Johnson LLP</i>• Alexander Reid, <i>BakerHostetler</i>