

COMMUNITY FOUNDATION LEGAL ISSUES DEEP DIVE DAY

Wednesday, November 9, 2016

10:00 am-4:00 pm (registration begins at 9:30 am)

Barnes & Thornburg LLP, 11 South Meridian St., Indianapolis, Indiana

10:00-10:30 am

Liability and Fiduciary Responsibility

Presenters: Joe Miller/Josh Abel - Indiana

10:30-11:30 am

Donor Issues

Presenters: Joe Miller/Josh Abel – Indiana

- Donor control
- Donor benefits
- Donor initiated fundraising

11:30 am-12:30 pm

Fund Management

Presenter: Amie Vanover - Ohio

- Critical elements of a fund agreement
- How to change a fund
- Successor advisors

12:30-1:30 pm

Lunch (each state spends time with local attorney)

1:30-2:00 pm

Legal Aspect of Investments

Presenter: Jennifer Oertel - Michigan

- Impact investing
- Investment management outside the investment pool

2:15-3:15 pm

Quick Topics

Presenters: Phil Purcell and Jennifer Oertel – Indiana/Michigan

- Lobbying and advocacy rules
- Conflict of interest
- Whistleblower
- Privacy/Confidentiality/Anonymity/Releases
- Excess business holdings/UBIT Requirements
- Charitable registration
- Affiliates

3:15-3:45 pm

Open Questions

Presenters: Phil Purcell and Jennifer Oertel – Indiana/Michigan

3:45-4:00 pm

Wrap-up and Adjourn