



SEPTEMBER LUNCHEON PROGRAM

“PRIVATE FOUNDATION INSIGHTS: COMPLIANCE FUNDAMENTALS & COMPENSATING BOARD MEMBERS”

TUESDAY, SEPTEMBER 20, 2022

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

COFFEE MEET AND GREET:

The Professional Women’s Network Committee has organized a meet and greet coffee station prior to our luncheon program. The event will be held in the Farragut Room (adjacent to Lincoln Hall on the Broad Street side of the main meeting room) from 11:30 a.m.-12:00 p.m. All meeting attendees are welcome to join us!

When it comes to formal charitable giving vehicles, private foundations offer the most flexibility and creativity for philanthropic endeavors. As they also are the most intricately structured, this presentation will help advisors understand two of their more complex issues:

How to avoid unintentional yet common IRS compliance violations such as “self-dealing.”

Review the many ways that insiders unknowingly self-deal or in which foundations inadvertently stumble, and the penalties and corrective action requirements associated with such activities.

How to fairly compensate board members.

Learn why compensation of foundation insiders must be “reasonable and necessary,” and how failure to do so can expose both the foundation and compensated individual to stiff penalties and public derision.

Participants will walk away with an unparalleled grasp of this subject matter and an enhanced appreciation for the subtleties of private foundation oversight.

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:

Jeffrey D. Haskell, J.D., LL.M. is a leading expert in the areas of private foundation law, compliance and taxation. He is chief legal officer for Foundation Source, the nation’s largest provider of management solutions for private foundations, a role in which he provides guidance on legal and tax issues to the company’s foundation clients and their advisors. He has worked with the firm since its inception in 2001.

Articles by Mr. Haskell have appeared in multiple legal, financial and philanthropy-related publications such as *Trust & Estates*, *Taxation of Exempts*, *Family Wealth Report*, *Kiplinger.com*, *Wealthmanagement.com*, and *eJewishPhilanthropy*. Additionally, he is a frequent speaker at conferences, and estate and tax planning councils across the U.S. Mr. Haskell is involved in pro bono work for public charities and has served as an adjunct

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**SEPTEMBER 20, 2022 LUNCHEON PROGRAM
REGISTRATION FORM**

Luncheon Program Fee:

PEPC Members (In-Person OR Virtual): \$45 Non-Members (In-Person OR Virtual): \$65

Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after September 16, 2022

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$45 per person) Non-Member (\$65 per person)

Participation Type: In-Person Meeting Virtual Meeting

Please select your lunch entrée:

Grilled Filet Mignon, Twice Baked Chive Potato, Spinach, Horseradish Beef

Mediterranean Vegetable Lasagna, Roasted Tomato Marinara, Grana Padano

Special Dietary Needs: _____

CONTINUING EDUCATION INFORMATION:

(Fee: \$15 per Credit)

Continuing Legal Education (1 credit).....Attorney ID: _____

Insurance Continuing Education (1 credit).....License Number: _____

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)