Advanced Legal Seminar

Community Foundations and Disaster Relief

Fall Conference for Community Foundations
Manchester Grand Hyatt, San Diego
September 22, 2013, 1:30-4:30pm

1:30pm  Welcome and Introductions
Moderator: Suzanne Friday, J.D., L.L.M., Counsel, Council on Foundations

1:35pm  Community Foundations and Disaster Relief
Presenter: Tracy L. Boak, J.D., Attorney, Perlman & Perlman, LLP
  o How Community Foundations Can Legally Provide Disaster Relief
  o IRS Tax Reporting Requirements for Public Charities
  o Employer-sponsored Disaster Relief Programs
  o Tax Implications for Donors and Recipients
  o Issues Related to Working with Federal, State and Local Government Entities.

3:05pm  Break

3:15pm  Dealing with Disaster
Presenter: Marco Cocito-Monoc, Ph.D., Senior Vice President of Programs, Greater New Orleans Foundation
  o Short-Term Assistance vs. Long-Term Needs (Case Study New Orleans)
  o Discussion of Whitepaper, “Where is the Role of Philanthropy in the RESTORE Act?”

3:45pm  Q &A Session
Tracy L. Boak, Attorney, Perlman & Perlman, LLP
Marco Cocito-Monoc, Senior Vice President of Programs, Greater New Orleans Foundation
Suzanne Friday, Counsel, Council on Foundations

4:30pm  Adjourn