



Private Foundation Summit 2025 Agenda

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FOUNDATION**SOURCE**



Private Foundation Summit 2025

Wednesday, April 23

Registration & Breakfast

7:30 a.m. – 8:20 a.m., Promenade Foyer

Welcome Remarks

8:20 a.m. – 8:30 a.m., Grand Ballroom

Essential Policies and Training for New Employees, Board Members, etc.

8:30 a.m. – 9:30 a.m., Grand Ballroom

Christi Annin, Suzanne & Walter Scott Foundation

Rebecca Bode, Peter Kiewit Foundation

Lauren Simpson, Morgan, Lewis & Bockius LLP

Networking Break

9:30 a.m. – 9:40 a.m., Promenade Foyer

Disqualified Persons and Self-Dealing: Individuals and Entities: Beyond the Basics

9:40 a.m. – 10:40 a.m., Grand Ballroom

Jennifer Deger, Gates Foundation

Jane Searing, Deloitte Tax LLP

Unique Private Foundation Investment Issues

10:50 a.m. – 11:50 a.m., Grand Ballroom

Saul Bakst, Table Management

Jessica Karantonis, Deloitte Tax LLP

Alison Looman, Ford Foundation



Box Lunch with Facilitated Round Table Discussions

11:50 a.m. – 12:50 p.m., Promenade Foyer

CONCURRENT SESSIONS

Breakout Room 1: Grants to Individuals

12:50 p.m. – 1:50 p.m., Grand Ballroom

Brenda Camacho, Center for Disaster Philanthropy

Lara Kalwinski, MacArthur Foundation

Elinor Ramey, Lowenstein Sandler LLP

Breakout Room 2: Global Operational Considerations for Private Foundations

12:50 p.m. – 1:50 p.m., Chinese Ballroom

Mai-Anh Fox, Ford Foundation

Amy Steele, Gates Foundation

CONCURRENT SESSIONS

Breakout Room 1: Support Beyond the Grant: Leveraging Assets for Change

2:05 p.m. – 3:05 p.m., Grand Ballroom

Anne Folkers, Suzanne & Walter Scott Foundation

Amy MacFadyen, EisnerAmper LLP

Breakout Room 2: Grantmaking Challenges: Grantees Other than Qualifying Public Charities That Are Not Controlled by the Private Foundation

2:05 p.m. – 3:05 p.m., Chinese Ballroom

Jennifer Deger, Gates Foundation

Jillian Diamant, Pivotal Ventures

Candice Meth, EisnerAmper LLP



Networking Break

3:05 p.m. – 3:20 p.m., Promenade Foyer

Reporting on Form 990-PF

3:20 p.m. – 4:20 p.m., Grand Ballroom

Sheryl Madden, The Kresge Foundation

Rebekah Stanley, Deloitte Tax LLP

Planning For and Addressing Risk: Internal Controls (Detective and Preventative), the Role of Management and Those Charged with Governance

4:30 p.m. – 5:30 p.m., Grand Ballroom

Christi Annin, Suzanne & Walter Scott Foundation

Candice Meth, EisnerAmper LLP

Reception

5:30 p.m. – 7:00 p.m.

Thank you to our reception sponsor, Deloitte!