



## Fall Conference for Community Foundations

### Advanced Legal Seminar

September 12, 2010 | 1–4 p.m.

Charlotte Convention Center | Meeting Room 207 D

#### Agenda

<b>1 p.m.</b>	<b>Welcome and Introductions</b>
<b>1:15 p.m.</b>	<b>Lobbying for Community Foundations: What the Law Allows</b> <i>Presented by: Kelly Shipp Simone</i> <ul style="list-style-type: none"><li>• IRS Regulations that Define Lobbying</li><li>• Lobbying Limits for Foundations</li><li>• Tracking Lobbying Expenses</li><li>• Form 990 Reporting</li><li>• Common Scenarios (e.g., Setting Up a Fund to Support a Ballot Measure)</li></ul>
<b>2:15 p.m.</b>	<b>Break</b>
<b>2:30 p.m.</b>	<b>Current Developments in International Grantmaking</b> <i>Presented by: Marc Owens</i> <ul style="list-style-type: none"><li>• Grants to Domestic Public Charities for Use Abroad</li><li>• Grants by Public Charities to Foreign Entities</li><li>• Grants to Foreign Entities by Private Foundations and from Donor Advised Funds<ul style="list-style-type: none"><li>○ Equivalency Determination</li><li>○ Expenditure Responsibility</li></ul></li><li>• Grants to Foreign Governments and Under Tax Treaties</li><li>• Terrorism and Embargo Issues</li></ul>
<b>3:30 p.m.</b>	<b>Q &amp;A Session</b>
<b>4 p.m.</b>	<b>Adjourn</b>