



Legal Matters for Community Foundations Workshop

Monday, June 12 | 9:00 a.m.-5:00 p.m. MT

Council Members \$339 | Non-members \$449

Led by the Council on Foundations Legal Team, this workshop is flexibly organized to ensure that your broad legal questions for administering funds, grants, and community foundation activities are addressed. The legal team will provide technical and practical understanding of complex rules and regulations.

Throughout the workshop, sessions will be curated by:

- Insight from Council's top-notch legal team that interacts with nearly 2,000 foundation leaders each year
- Trends spotted by our broader team, including National Standards for U.S. Community Foundations
- Timely, relevant take on the basics that informs day-to-day business decisions and operations
- Expertise to advance your knowledge of the organization's inner workings--from admin to governance, donor stewardship to grantmaking.
- With each session, there will be time for questions and a deep exploration of the answers. This workshop is open to any board or staff member from any community foundation that is eager to dive into the legalities of our business model and unlock the truth to effective management and leadership of a community foundation.

Agenda

Morning Session: 9:00 a.m.-12:00 p.m. MT

- General Overview of new rules, regulations, and developments for community foundations
- Most Common Legal Complexities Facing Community Foundations
 - Post-graduation scholarships
 - H.R. 3988 (universal deduction)
 - CARES Act
 - Updated Charity Act
 - Tax Deductibility
 - UPMIFA
 - Most Common Legal Complexities Facing Community Foundations

Networking Lunch: 12:00-1:00 p.m. MT

Afternoon Session: 1:00-4:00 p.m. MT

- Grants to Individuals – Scholarships
- Corporate Funds, Hardship Assistance, and Disaster Relief
- Most Common Legal Complexities Facing Community Foundations
 - Agency Funds, Agreements, and Geographic Affiliates
 - Agency funds and designated funds
 - Fund Agreements: Variance power, etc.