AGENDA

MANAGING CHARITABLE ASSETS: THEORY, LAWS, ACCOUNTING RULES, AND PRACTICE
November 6 and 7, 2003

Thursday, November 6, 2003

2:00 – 3:30 p.m.  Science and Art of Investing Charitable Assets: Modern Portfolio Theory
                  Martin J. Gruber, Presenter
                  Elroy Dimson, Commentator
                  Mark P. Kritzman, Commentator

4:00 – 5:30 p.m.  Legal and Accounting Framework: Nontax Issues
                  Antonia M. Grumbach, Presenter
                  John H. Langbein, Commentator
                  D. Edward Martin, Commentator

5:30 – 6:30 p.m.  RECEPTION

6:30 – 8:30 p.m.  DINNER

Friday, November 7, 2003

9:00 – 10:30 a.m. Legal Framework: Tax Issues
                  Richard L. Schmalbeck, Presenter
                  Celia A. Roady, Commentator
                  Stephen Schwarz, Commentator

11:00 a.m. – 12:30 p.m. Legal Framework: Global Investing
                         Stephen E. Shay, Presenter
                         Harvey P. Dale, Commentator
                         Harvey J. Goldschmid, Commentator

12:30 – 2:00 p.m.  LUNCH

2:00 – 3:30 p.m.  Science and Art of Investing Charitable Assets: Practice
                  Laurance R. Hoagland, Jr., Panelist
                  Jane L. Mendillo, Panelist
                  Nina F. Scherago, Panelist

3:30 p.m.  SHERRY BAR