

DRAFT December 8, 2022

AGENDA

**MANAGING CHARITABLE ASSETS REVISITED:
A VIEW FROM THE 21ST CENTURY
October 26-27, 2023**

Thursday, October 26, 2023

2:00 – 3:30 p.m.	Science and Art of Investing Charitable Assets: Modern Portfolio Theory
4:00 – 5:30 p.m.	Legal and Accounting Framework: Nontax Issues
5:30 - 6:30 p.m.	RECEPTION
6:30 - 8:30 p.m.	DINNER

Friday, October 27, 2023

9:00 - 10:30 a.m.	Legal Framework: Tax Issues
11:00 a.m. – 12:30 p.m.	Legal Framework: Newfangled Assets
12:30 - 2:00 p.m.	LUNCH
2:00 - 3:30 p.m.	Science and Art of Investing Charitable Assets: Practice
3:30 p.m.	SHERRY BAR