

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**

Luis Viceira, Presenter
Susan Yun Lee, Commentator
David Salem, Commentator

4:00 – 5:30 p.m.

Legal and Accounting Framework: Nontax Issues

Susan Gary, Presenter
Michael Klausner, Commentator
Lorry Spitzer, Commentator

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

Richard Schmalbeck, Presenter
Celia Roady, Commentator
Steve Schwarz, Commentator

11:00 a.m. – 12:30 p.m.

Legal Framework: Newfangled Assets

Lloyd Mayer, Presenter
Rob Wexler, Commentator
LaVerne Woods, Commentator

12:30 - 2:00 p.m.

LUNCH

2:00 - 3:30 p.m.

Science and Art of Investing Charitable Assets: Practice

Mark Kritzman, Panelist
Kim Lew, Panelist
Brian O'Neil, Panelist

3:30 p.m.

SHERRY BAR