

## AGENDA

### MANAGING CHARITABLE ASSETS REVISITED: A VIEW FROM THE 21<sup>ST</sup> 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 M. Viceira, Presenter  
Susan Yun Lee, Commentator  
David A. Salem, Commentator

4:00 – 5:30 p.m.

**Legal Framework: Tax Issues**

Richard L. Schmalbeck, Presenter  
Celia A. Roady, Commentator  
Stephen Schwarz, 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 and Accounting Framework: Nontax Issues**

Susan Gary, Presenter  
Michael Klausner, Commentator  
A.L. (Lorry) Spitzer, Commentator

11:00 a.m. – 12:30 p.m.

**Legal Framework: Newfangled Assets**

Lloyd Hitoshi Mayer, Presenter  
Robert A. 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 P. Kritzman, Panelist  
Kim Y. Lew, Panelist  
Brian O'Neil, Panelist

3:30 p.m.

SHERRY BAR