

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