

## AGENDA

### BORDER PATROL: CHARITABLE STATUS DESPITE INUREMENT OR PRIVATE BENEFIT?

October 27 – 28, 2011

Thursday, October 27, 2011

2:00 p.m. - 3:30 p.m.

**Border Patrol: What Activities or Transactions are Fatal to Charitable Status?**

Richard L. Schmalbeck, *Presenter*  
Marion R. Fremont-Smith, *Commentator*  
Marcus S. Owens, *Commentator*

4:00 p.m. - 5:30 p.m.

**Border Patrol: Inurement and Excess Benefit**

Harvey P. Dale, *Presenter*  
Celia A. Roady, *Commentator*  
Adelbert L. Spitzer, *Commentator*

5:30 p.m. - 6:30 p.m.

RECEPTION

6:30 p.m. - 8:30 p.m.

DINNER

Friday, October 28, 2011

9:00 a.m. - 10:30 a.m.

**Border Patrol: Private Benefit**

John D. Colombo, *Presenter*  
Suzanne Ross McDowell, *Commentator*  
Douglas M. Mancino, *Commentator*

11:00 a.m. - 12:30 p.m.

**Border Patrol: Private Foundation Rules**

Ellen P. Aprill, *Presenter*  
Stephen Schwarz, *Commentator*  
Robert A. Wexler, *Commentator*

12:30 p.m. - 2:00 p.m.

LUNCH

2:00 p.m. - 3:30 p.m.

**Border Patrol Around the World**

Australia: Myles McGregor-Lowndes  
Canada: Robert B. Hayhoe  
United Kingdom: Debra J. Morris

3:30 p.m.

SHERRY BAR