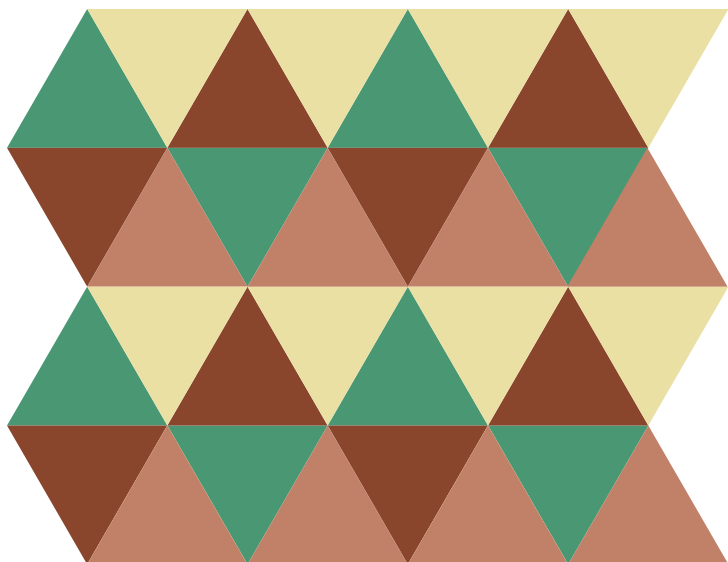




THE RULES & REGULATIONS OF PRIVATE FOUNDATION MANAGEMENT APRIL 22, 2015

PRESENTED BY
WACO FOUNDATION & JRBT

REGISTER AT [HTTPS://PRIVATEFOUNDATIONMANAGEMENT.EVENTBRITE.COM](https://PRIVATEFOUNDATIONMANAGEMENT.EVENTBRITE.COM)

WEDNESDAY, APRIL 22, 2015 • CPE CREDITS AVAILABLE
GREATER WACO CHAMBER OF COMMERCE • 101 S. THIRD ST
9:00 - 11:30 AM • CHECK IN BEGINS AT 8:30 AM

Many people consider private foundations to be a simple and easy way to advance their individual or family philanthropic interest. The rules and regulations involved with their management, however, are not that simple. If you have established a private foundation or if you are involved with the management and operation of a private foundation, you should consider attending this workshop which will provide an overview of some important management and reporting rules that can, and often do, create difficulties (and penalties) if overlooked. This brief workshop will also be helpful to advisors who work with private foundations and/or people interested in private foundations.

Led by Jaynes, Reitmeier, Boyd & Therrell (JRBT), this half-day workshop will review the ins and outs of the private foundation world. Topics to be covered in the session include:

- Tax treatment by donors
- Expenditure responsibility
- Self-dealing & disqualified persons
- Qualifying distributions
- Excess business holdings
- Jeopardizing investments
- Investment Excise Tax

CPE and other continuing education credits may be available.

Registration closes April 17, 2015.



This workshop is designed for those who are considering establishing a private foundation and for individuals involved in the management and operation of private foundations, including attorneys, accountants, financial advisors, executive directors, board members, trustees, etc.