

NONPROFIT ORGANIZATIONS INSTITUTE

LIFECYCLE OF PRIVATE FOUNDATION ENGAGEMENT AND COMPLIANCE CONCERNS

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INTRODUCTIONS

PART I: START-UP CONSIDERATIONS – LAUNCHING A PRIVATE FOUNDATION

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Start-Up Considerations

- Should a private foundation be established?
 - Counseling considerations
 - Alternative and complementary philanthropic structures

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Start-Up Considerations (cont'd)

- What relationships will the private foundation have with insiders?
 - Identifying DQPs
 - Understanding and structuring transactions to avoid self-dealing

Start-Up Considerations (cont'd)

- How, when and with what assets will the private foundation be funded?
 - Understanding distribution requirements
 - Understanding investment restrictions
 - Planning for compliance

Also available as part of the eCourse

[2022 Nonprofit Organizations eConference](#)

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"Lifecycle of Private Foundation Engagement and Compliance Concerns: PART 1"